intuit ProFile® Tax

# ProFile 2021-2022
# User Guide

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# About this User Guide

**Why a User Guide?**

Simply put, because our customers asked for it! You wanted an easy-to-reference collection of information on ProFile's functionality, organized and simple to use. You also wanted something that you could hand to seasonal hires and employees to help get them started with ProFile, without requiring a lot of coaching.

**For new ProFile customers** you will find a wealth of easy-to-review material that covers the basic functionality of ProFile. You can come back to the User Guide as the tax season progresses or as the way you use ProFile changes.

**For returning ProFile customers** you will already know the basic (and even the advanced) functionalities within ProFile. The User Guide puts all the information in one convenient, easy-to-use document that you can review, print, and bookmark for future reference.

Review the support article for in-season and holiday hours and closures.

# System Requirements for ProFile

- Internet connectivity is required for activation, licensing, automatic updates, and additional ProFile features (for example, EFILE)
- Network/workstation install UNC path is not supported
- ProFile requires operating system Windows 10 or Windows 8.1
- .NET 4.8 installation & registration are required

**Note:** Apple products are not supported.

To get the best results from your software, ProFile requires the following minimum configuration:

| | |
|---|---|
| **Processor** | • 2.4 GHz dual-core processor or faster |
| **Operating System** | • Windows 10 (recommended) or Windows 8.1<br>• 64 bit OS |
| **Memory** | • 4 GB or higher |
| **Hard Drive Space** | • 4 GB for installation |
| **Printer** | • Windows compatible printers |
| **Display** | • 1024 x 768 minimum resolution<br>• 16-bit or higher colour |
| **Internet** | • Internet Explorer 11.0 or higher<br>• A high-speed Internet connection is recommended |
| **Other** | • Network connectivity is required for database sharing and sharing returns or plans between ProFile users<br>• eReview feature requires a MAPI email client and a PDF reader application (for example, Adobe PDF Reader®)<br>• Microsoft .NET Framework 4.8 |

# Getting Started with ProFile

# Downloading and Installing ProFile

An Internet connection is required to download and install ProFile. In addition, you must have administrator rights for the computer on which you wish to install ProFile.

### Download ProFile

1. Navigate to the ProFile download page.
2. Determine if you are a new customer, returning customer, if you require OnePay, or a reinstall of ProFile.
3. Follow the necessary instructions. In many cases, the requirement will include the download of the ProFile installation file (called **gpsetup.exe**).
4. Your web browser may ask you to confirm if the file download can proceed. Click **Yes** or **OK** when prompted. If prompted to select a location to store the installation file, we recommend your computer's Desktop or Downloads folder, or another easy-to-find folder.

The download may take several minutes.

### Install ProFile

1. Locate the saved **gpsetup.exe** installation file.
2. Double-click the file to begin the installation. If you are using Windows 8, right-click the file and select the **Run as Administrator** option.
3. Follow the dialogue boxes when prompted to install ProFile.

gpsetup.exe 3/15/2017 12:24 PM Application 1,102,691 KB
gpsetup.exe Date modified: 3/15/2017 12:24 PM Date created: 3/15/2017 12:01 PM
Application Size: 1.05 GB

# Activating ProFile

**Note:** An Internet connection is required to activate ProFile. In addition, you must have administrator rights for the computer on which you wish to install ProFile.

**Activating from the ProFile icon:**

1. Locate the **ProFile icon** on the computer desktop; it installs there during the download and activation process.

2. Double-click the ProFile icon.

The product code prompt displays when ProFile opens. The product code and license key information is on the purchase receipt.

3. Enter your Product Code and License Key, and click the **Activate** button.

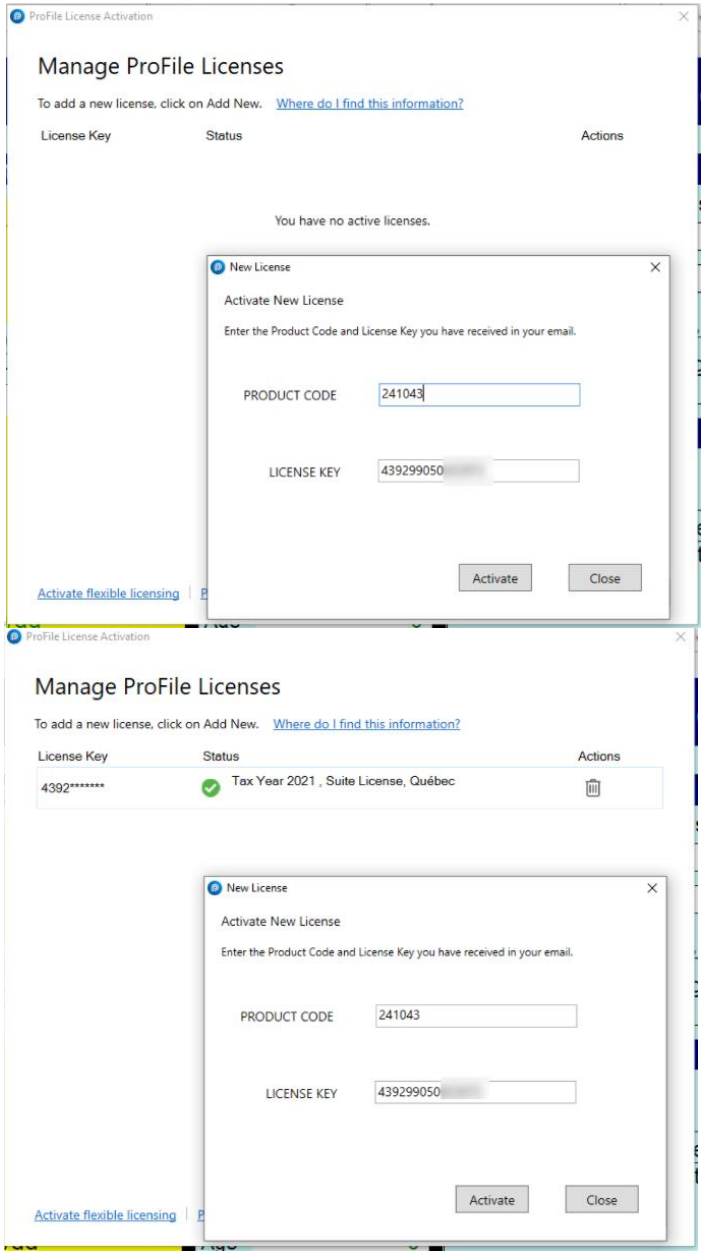
The product code and license key activate; ProFile displays a confirmation message. Once activated, you can close the confirmation window.

4. Click **Add another license** to add more licenses, if necessary. If you have purchased additional licenses for a module, enter the Product Code and License Key only once on each additional computer.

5. Click the **I'm Done** button after all product codes have been entered. Activation may take a few minutes to complete.

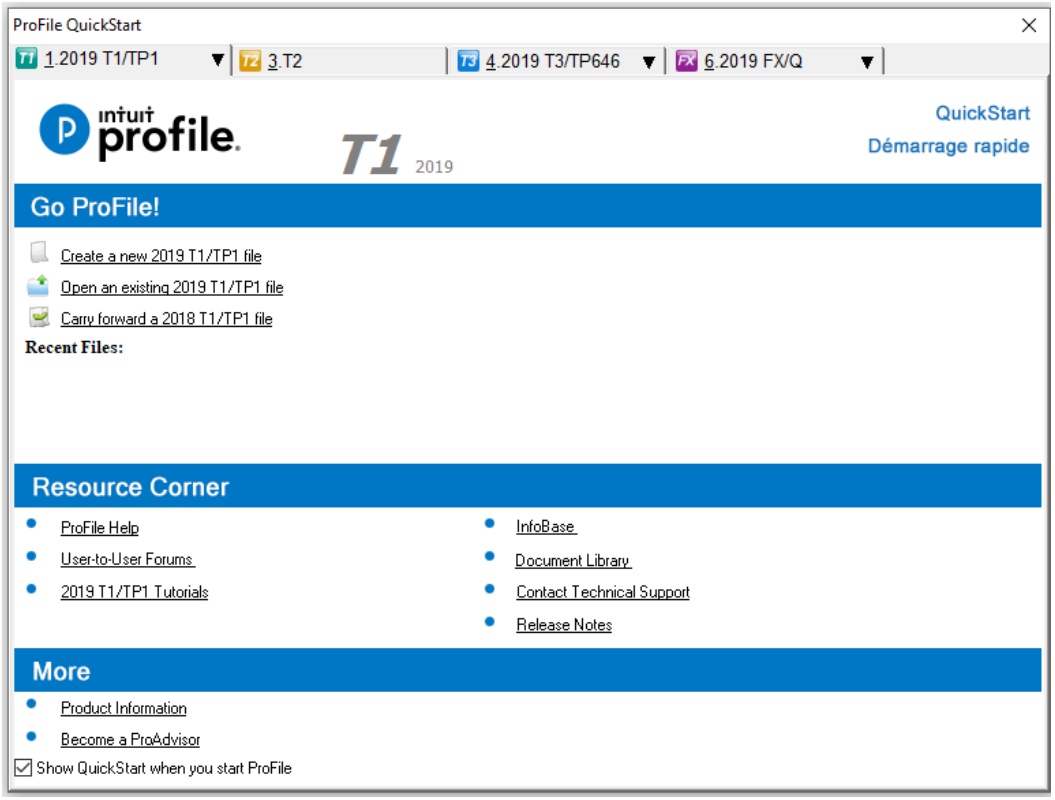
ProFile displays a message requesting a check to determine if you are using the most current version of the software. You can skip or delay this check, or click the **OK** button to proceed with the check.

You have successfully activated ProFile.



# QuickStart Menu in ProFile

The QuickStart menu makes getting started with ProFile easier and faster.




**QuickStart menu tabs**

Each available module occupies a tab along the top of the QuickStart menu.

Each module tab features a small black arrow that expands to list display previous tax years.

**Links from the QuickStart** window lets preparers easily undertake the following:

- Create a new file or return
- Open an existing file that was previously saved
- Carry forward a file from a previous taxation year to the current taxation year
- Open a file that was recently worked on
- Access in-product Help, user forums, and more support resources

**Turn off the QuickStart menu:**

The QuickStart menu can be turned off if you prefer not to use its functionality.

1. Identify the checkbox in the bottom corner of the QuickStart menu.
2. Toggle off the checkbox; the QuickStart menu will no longer appear when ProFile starts.
3. To re-establish the QuickStart menu at a later time, select the **QuickStart** option under the **Help** toolbar menu.

# Using a Trial License in ProFile

A trial license gives preparers the opportunity to try the functionality of ProFile without any cost.

**What is included with a trial license?**

A trial includes access to all the modules and features ProFile has to offer, with the exception of filing completed tax returns. These features include:

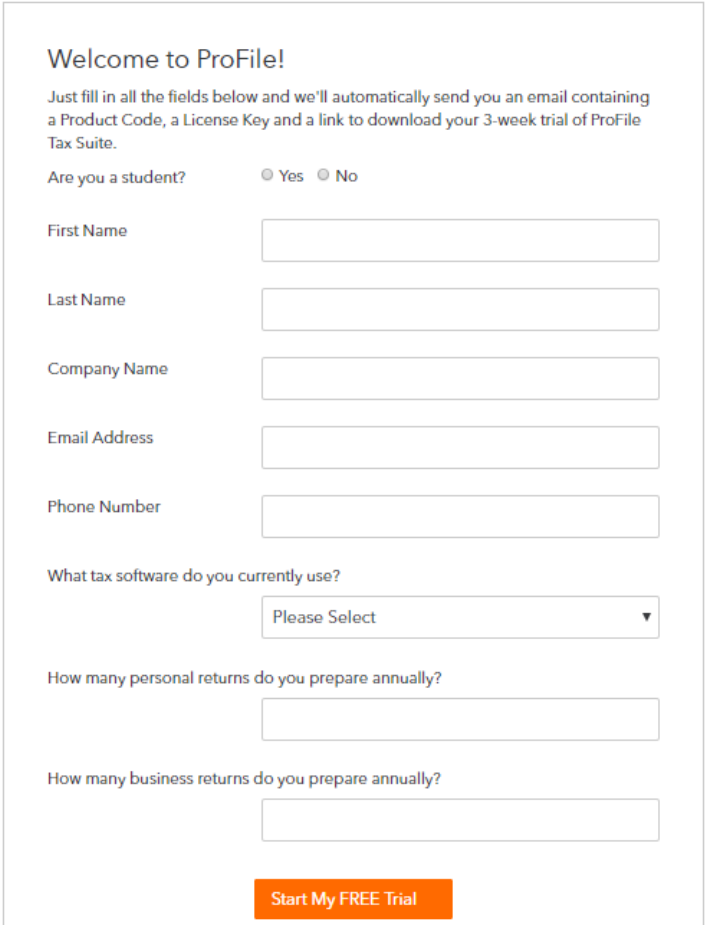
- T1/TP1 for Individual tax returns
- T2 for Corporate tax returns
- T3/TP-646 for Trust returns
- FX/FXQ for additional forms (T4/T5, etc.)

**Getting a trial license:**

1. Visit the free trial section of the ProFile website.
2. Complete the **information fields on the trial page** and submit.

The temporary license key and product codes are provided via email.

3. Download ProFile, enter your license key/product codes, and begin your free trial.


Welcome to ProFile!
Just fill in all the fields below and we'll automatically send you an email containing a Product Code, a License Key and a link to download your 3-week trial of ProFile Tax Suite.
Are you a student?
Yes
No
First Name
Last Name
Company Name
Email Address
Phone Number
What tax software do you currently use?
Please Select
How many personal returns do you prepare annually?
How many business returns do you prepare annually?
Start My FREE Trial

# Using the Start Screen in ProFile

The ProFile start screen contains most of the options and elements required to complete forms and slips. When starting ProFile for the first time, many of the action icons will be “greyed out” or inactive; once forms and slips are created, many will become active for use.

### The top toolbar menu

ProFile’s top toolbar menu contains most options necessary to begin completing and filing client returns:

The **File** menu includes many of the functional features for ProFile, including Open a return, Carry Forward, Import Data, and Print.

The **Goto** menu activates the ProFile database options of Form Explorer and Client Explorer, as well as Hub.

The **Form** menu allows users to open, print, and close forms in ProFile, as well as clear populated forms.

The **Options** menu allows preparers to customize the ProFile environment, pricing, module, and database.

The **EFILE** menu displays current and archived EFILE returns, as well as the ability to set EFILE options.

The **Online** menu connects users to online support materials, the Live Community, and software updates.

The **Training** menu lists in-product tutorials for individual tax years and modules.

The **Window** menu gives ProFile users the ability to reorient the view of ProFile.

The **Help** menu links users to support materials, flexible licensing options, and the in-product Help feature.

# Setting Preparer Information in ProFile

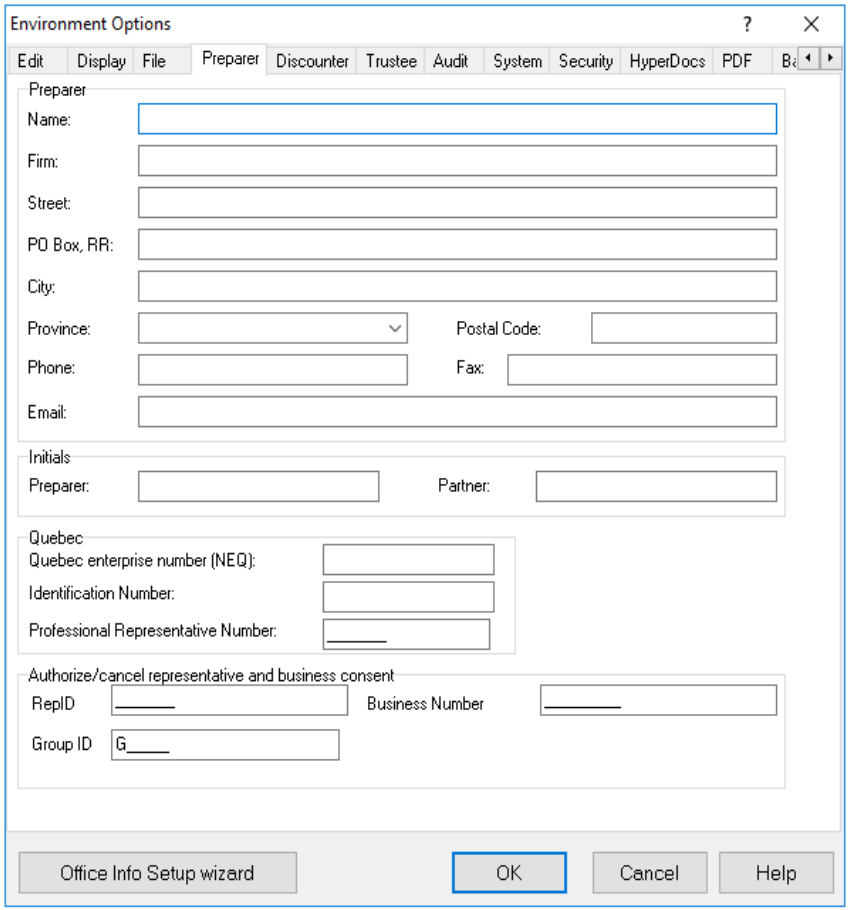
Preparer information can be conveniently entered in ProFile. This allows the Preparer section of ProFile Info forms to automatically populate whenever a new form is created.

1. Select the **Environment…** option from the **Options** drop-down menu in the top toolbar.

The **Environment Options** window displays.

2. Select the **Preparer** tab; a list of information fields displays.
3. Complete the necessary fields.
4. Click the **OK** button.

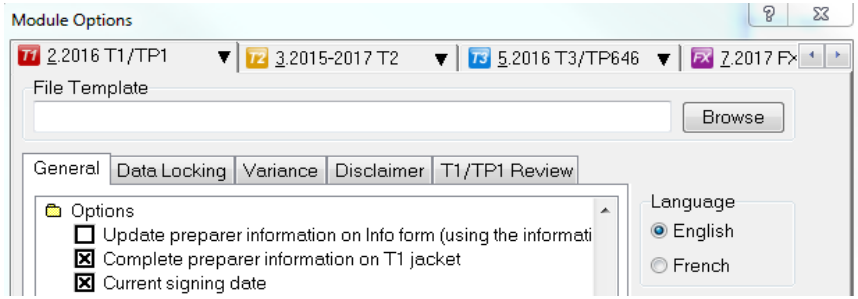
The preparer information saves.




**Automatically updating preparer information changes:**

Preparers can set an automatic update for the Preparer section of returns when changes are retroactively made to the preparer information. For example, if the name of the preparer's firm changes, the returns with the firm's name automatically update to the new name.

1. Select the **Module…** option from the **Options** drop-down menu.
2. In the **General** tab, scroll down to the **Options** section.
3. Activate the **Update preparer information on Info form** checkbox.
4. Click the **OK** button; the setting saves.



# Managing ProFile's Password-Protection Function

**Frequently Asked Questions**

**What modules support access to password-protected files?**
Access by features to password-protected files applies to T1, T2, T3, and FX modules.

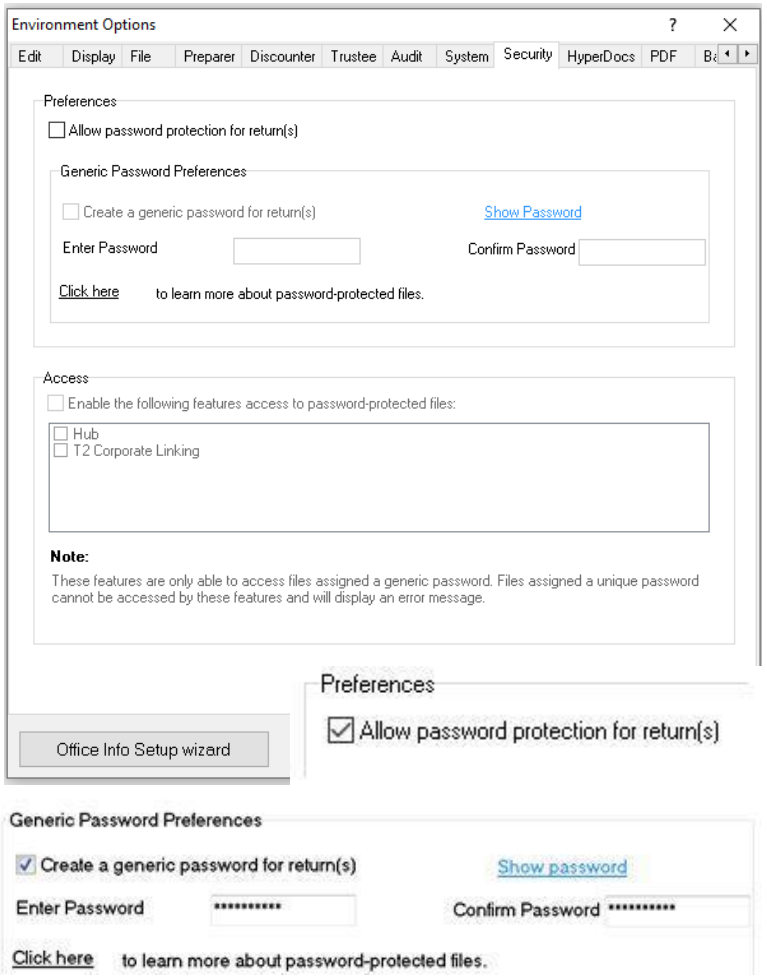
**What tax years support access to password-protected files?**
Access by features to password-protected files applies to tax years 2015 and onwards.

**What features currently support access to password-protected files?**
Currently the Hub and Corporate Linking features support access to password-protect files. More features will support access in future ProFile releases.

**Applying generic password protection to files:**

Applying a generic password permits all future or updated files to be accessible by ProFile's features.

1. Open ProFile.
2. Navigate to the **Security** tab.
3. Select the **Allow password protection for return(s)** checkbox.
4. Select the **Create a generic password for return(s)** checkbox; the **Enter Password** and **Confirm Password** fields activate.
5. Enter a password and confirm it.




**Note:** Click the **Show Password** link to display the password as it is entered. Click the link again to conceal the password.

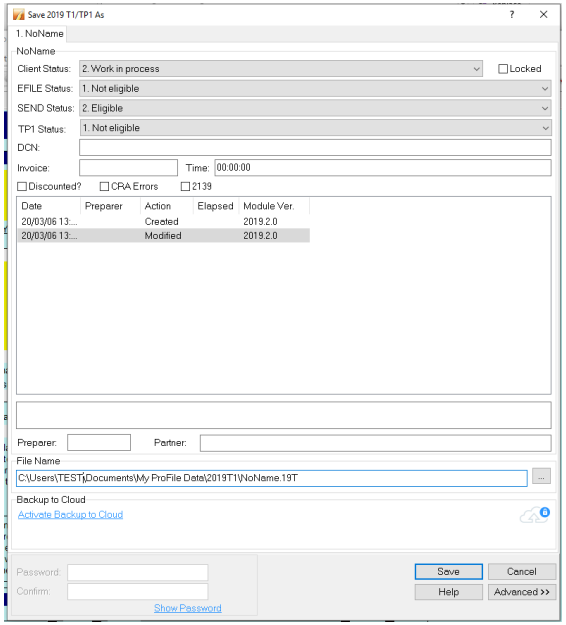
# Managing ProFile's Password-Protection Function, Continued

6. Select the **Enable the following features access to password-protected files** checkbox.
7. Select the feature to permit access to password-protected files (for example, Hub and/or Corporate Linking).
8. Click the **OK** button; the password-protection feature activates. Users can now apply password-protection to files.

**Applying password-protection for files:**

1. Complete a new file in ProFile.
2. Select the **Save As…** option under the **File** drop-down menu in the top toolbar; the **Save As** window displays.
3. Select the **Use generic password** checkbox in the bottom-left corner of the window.

   **Note:** Click the **Show password** link to display the password as it is entered. Click the link again to conceal the password.
4. Click the **Save** button; the file saves with the new generic password and is readable by the selected ProFile features.



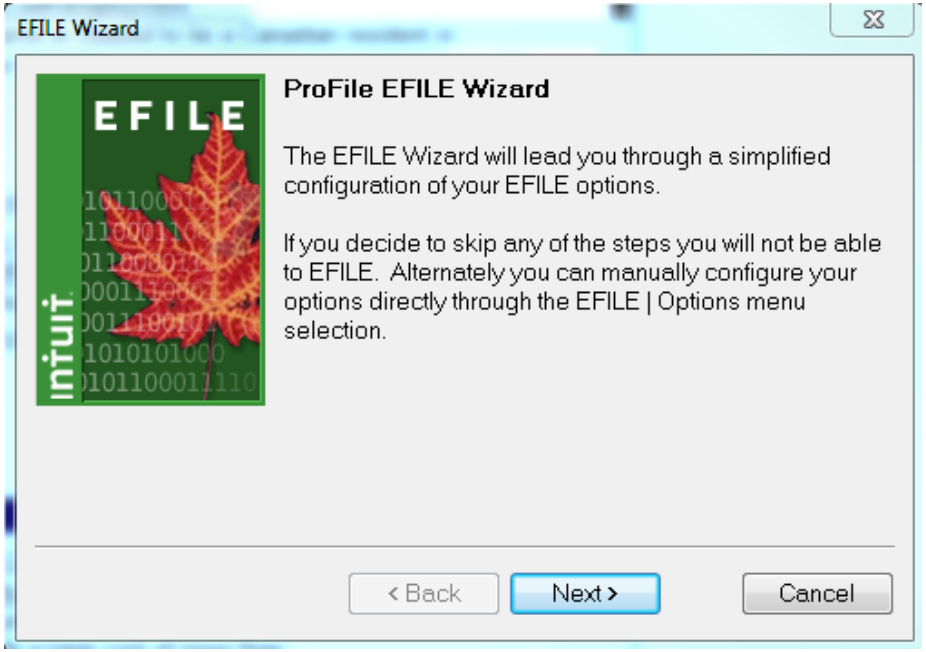
**Note:** Be sure you choose a password that you can remember. If it is lost, it cannot be recovered, even by Intuit.

**Related Articles**

Review the support article for additional details.

# Setting up for EFILE in ProFile

Prior to using the EFILE function for a return, it is necessary to use the set-up wizard in ProFile.


EFILE Wizard
EFILE
intuit.
ProFile EFILE Wizard
The EFILE Wizard will lead you through a simplified configuration of your EFILE options.
If you decide to skip any of the steps you will not be able to EFILE. Alternately you can manually configure your options directly through the EFILE | Options menu selection.
< Back
Next >
Cancel

**Setting up for EFILE:**

1. Select the **Set EFILE Password** option from the **EFILE** drop-down menu in the top toolbar.

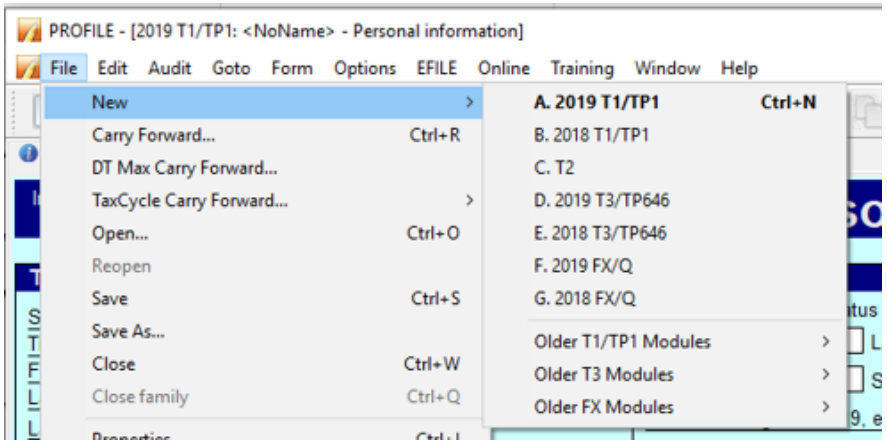
The **EFILE Wizard** displays.

2. Click the **Next** button to proceed.
3. During the Set EFILE Password process, users will require the following:
    - EFILE On-Line Number (from CRA)
    - EFILE On-Line Password (from CRA)
    - NetFile Quebec Number (if applicable, from MRQ)
    - NetFile Quebec Password (if applicable, from MRQ)
    - EFILE number (from CRA)
4. Click the **Finish** button when all applicable information is entered.

**Note**: If you are using an Options Package, save the options package **after** entering in the new EFILE information.

# Creating a New File in ProFile

Creating a new file or return in ProFile is quick and convenient.



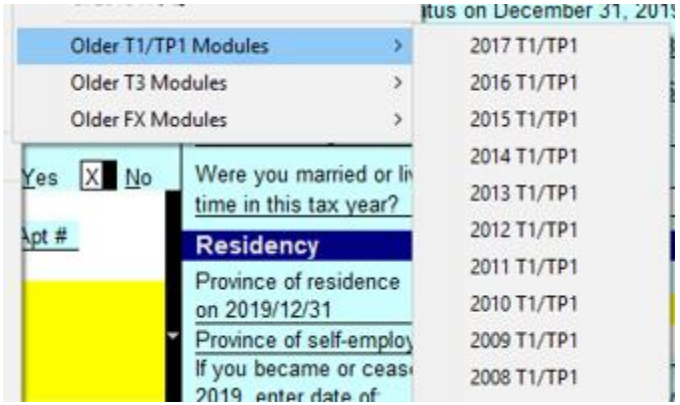

**Note:** Only tax modules that have been purchased can be created in ProFile. However, previous tax years are made available for the purchased tax module.

**Creating a new file:**

1. Open ProFile.
2. Select the **New** option from the **File** drop-down menu in the top toolbar.

A list of available modules displays in the menu.

3. Select the desired module; a new return opens in ProFile.




**Creating Older Files:**

There are three options under the **New** option in the **File** drop-down menu for older modules:

- Older T1/TP1 Modules
- Older T3 Modules
- Older FX Modules

1. Select the applicable option for creating an older module (for example, T1/TP1); a list of previous tax years supported by ProFile displays.
2. Select the desired module; a new return opens in ProFile.

# Fast Reopening of Files

ProFile lets preparers quickly reopen returns that they have recently worked on.

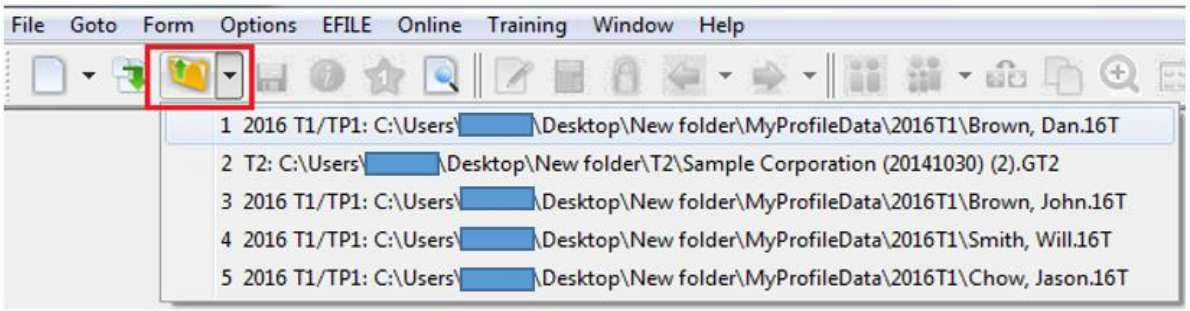
**Fast reopen of returns:**

1. Click the **arrow next to the file folder icon** in the top ProFile toolbar.

A list of recently opened returns displays.

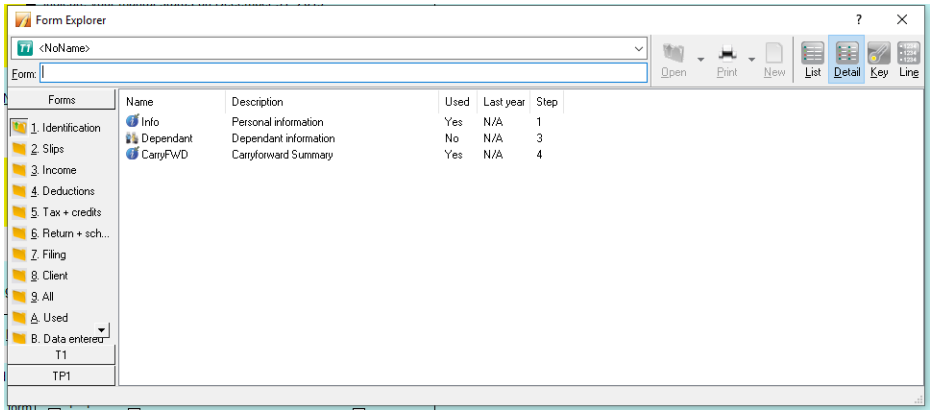
2. Select the return to continue working on; the return opens.

**Note:** Preparers can also review a list of recently opened returns under the **File** menu in the top ProFile toolbar.


File Goto Form Options EFILE Online Training Window Help
1 2016 T1/TP1: C:\Users\ \Desktop\New folder\MyProfileData\2016T1\Brown, Dan.16T
2 T2: C:\Users\ \Desktop\New folder\T2\Sample Corporation (20141030) (2).GT2
3 2016 T1/TP1: C:\Users\ \Desktop\New folder\MyProfileData\2016T1\Brown, John.16T
4 2016 T1/TP1: C:\Users\ \Desktop\New folder\MyProfileData\2016T1\Smith, Will.16T
5 2016 T1/TP1: C:\Users\ \Desktop\New folder\MyProfileData\2016T1\Chow, Jason.16T

# Using Form Explorer in ProFile

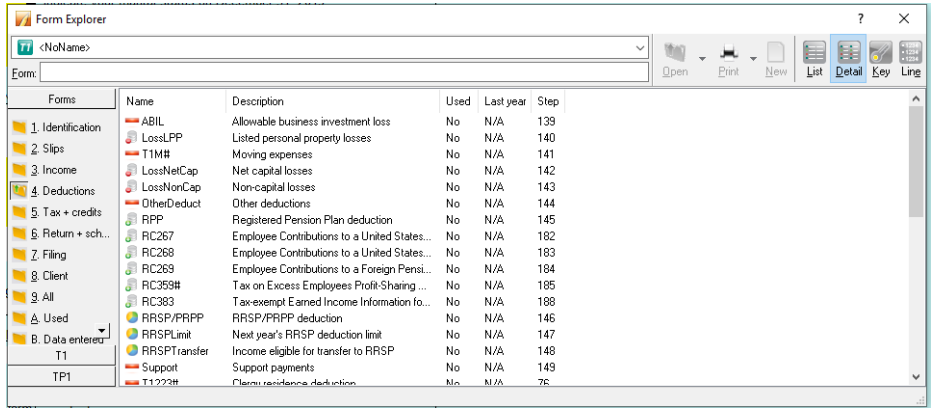
The Form Explorer feature allows preparers to locate individual forms, lines, and details within a client's return. In addition, preparers can print forms from the Form Explorer and determine when it was last updated.




### Starting the Form Explorer

1. Open ProFile.
2. Open a return (for example, a T1).
3. Select the **Form Explorer** option from the **Goto** drop-down menu in the top toolbar.

The **Form Explorer** opens; the client's name displays in the top-left corner.




### Using the Form Explorer:

1. Select a view option from the top-right menu buttons. View options include:
   - **List** displays all forms in the return
   - **Detail** displays details and/or status about all forms in the return
   - **Key** searches the return for keywords (for example, **RRSP**)
   - **Line** displays each line in every form in the return.

**Tip:** Hover the mouse over each form to see a full title.

2. Double-click any form listed in the **Forms Explorer**; the form opens in ProFile.
3. Click the **Print** button to print any form from the Form Explorer.

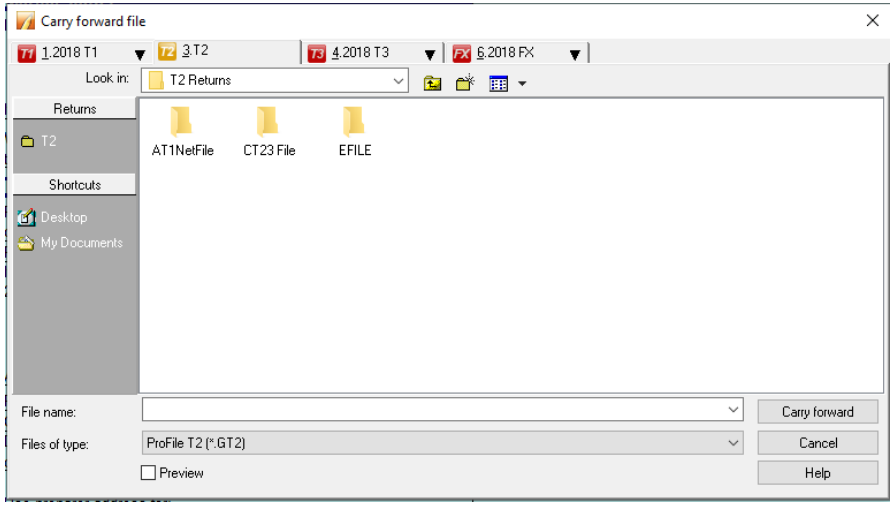
# Carry Forward Files in ProFile

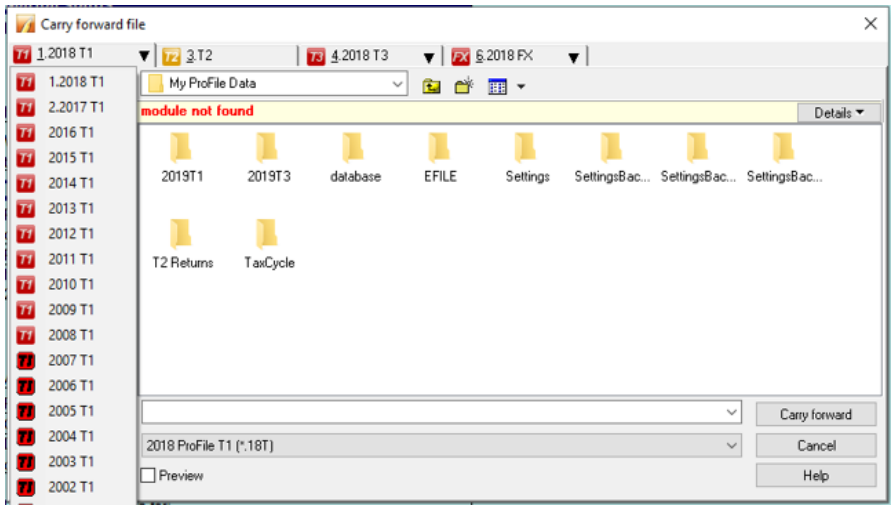
Carry forward is a ProFile service that allows existing client information from previous year's files to be "carried forward" into a new file, saving time and effort for preparers. Preparers can also carry forward a previous year's ProFile file or a file prepared using a competitor's product, as well as multiple files at one time.

### Carry forward files in ProFile:

1. Select the **Carry Forward…** option from the **File** drop-down menu in the top toolbar.
2. Select the module (for example, T1) and tax year of the file to carry forward from the drop-down list.
3. Select the specific file to carry forward.
4. Click the **Carry forward** button.

The selected file carries forward.




### Carry forward other vendor's files

ProFile supports the carry forward of files for the following vendors: Taxprep, TaxCycle, Cantax, and DTMax.

Review our full support article on carrying forward other vendor's returns.

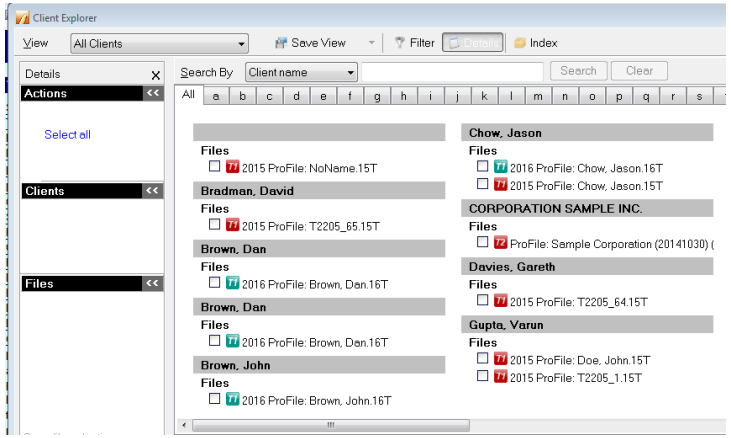
# Carry Forward Files in ProFile, Continued

**Carrying forward multiple files using the Client Explorer database**

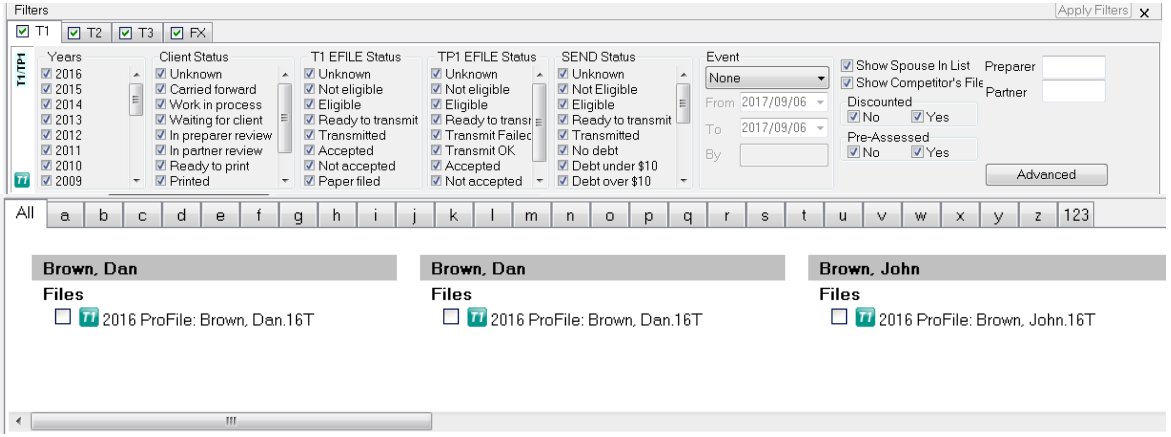
**If the preparer used ProFile in the previous tax year…**

1. Select the **Client Explorer** option from the **Goto** drop-down menu in the top toolbar.

The Client Explorer displays a list of last year's files.




2. Click on the **Filter** button; the filter option window displays.
3. Use the filter options to identify which files to carry forward. For example, if you only want to carry forward T1 files from the year 2018, you would select the **T1** module tab, then the **2018**-year designation.
4. Click the **Apply Filters** button. The files matching the selected filter options display.
5. Select the files to carry forward. To select all files, right-click in the window and choose **Select All** from the pop-up menu; all files highlight.
6. Right-click on the selected file(s) and select the **Carry Forward Files** option from the menu.




The file(s) carry forward.

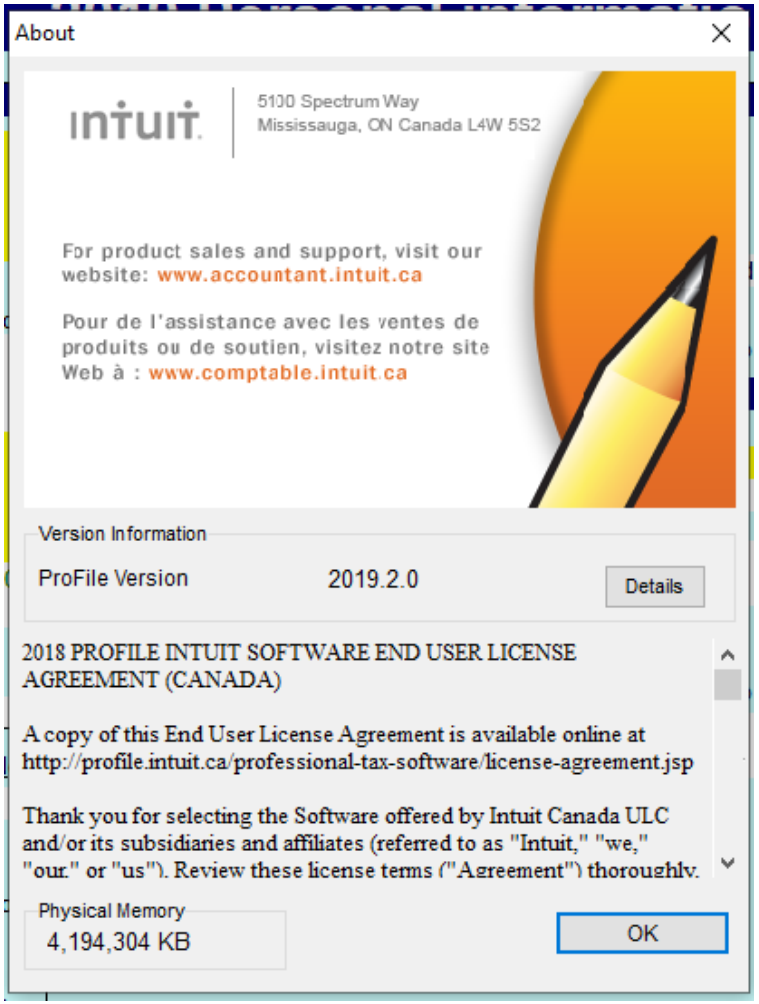
**Related Article:**

Review the support article on carrying forward files using the Client Explorer database.

# Checking Your Version of ProFile

ProFile is constantly undergoing improvements and adding to its features to benefit customers. It is important for preparers to have the latest version to ensure the full functionality of ProFile is available.

In addition, knowing where and how to check the version of ProFile is helpful in the case of a support call; ProFile's Care representatives will often ask which version of the software is in use when troubleshooting an issue.


About
intuit
5100 Spectrum Way
Mississauga, ON Canada L4W 5S2
For product sales and support, visit our website: www.accountant.intuit.ca
Pour de l'assistance avec les ventes de produits ou de soutien, visitez notre site Web à : www.comptable.intuit.ca
Version Information
ProFile Version
2019.2.0
Details
2018 PROFILE INTUIT SOFTWARE END USER LICENSE AGREEMENT (CANADA)
A copy of this End User License Agreement is available online at http://profile.intuit.ca/professional-tax-software/license-agreement.jsp
Thank you for selecting the Software offered by Intuit Canada ULC and/or its subsidiaries and affiliates (referred to as "Intuit," "we," "our," or "us"). Review these license terms ("Agreement") thoroughly.
Physical Memory
4,194,304 KB
OK

**Checking ProFile version:**

1. Open ProFile.
2. Select the **About** option from the **Help** drop-down menu in the top toolbar.

The **About** window displays.

3. Review the ProFile version number (for example, **2019.2.0**).

# Updating ProFile to the Latest Version

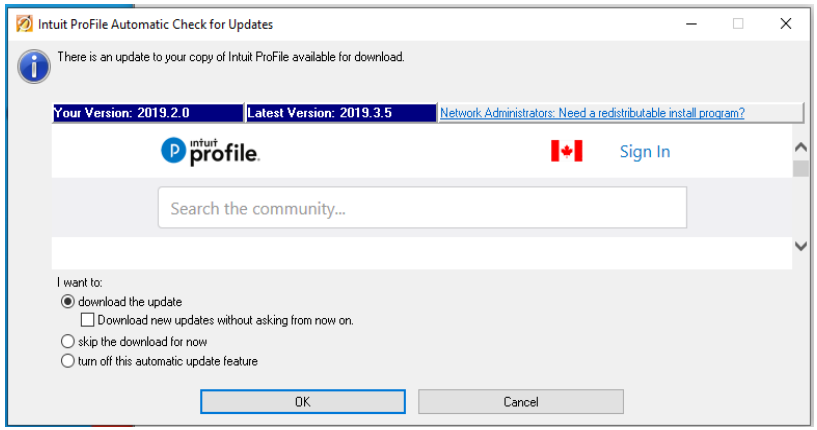
During the tax season, ProFile updates with new CRA information, tax rates, forms, and more. It is important to keep ProFile up to date to ensure compliance with the latest CRA requirements. The recommendation is to check - at the very minimum - once per week.

**Updating ProFile:**

1. Open ProFile.
2. Select the **Check for Updates…** option from the **Online** drop-down menu in the top toolbar.

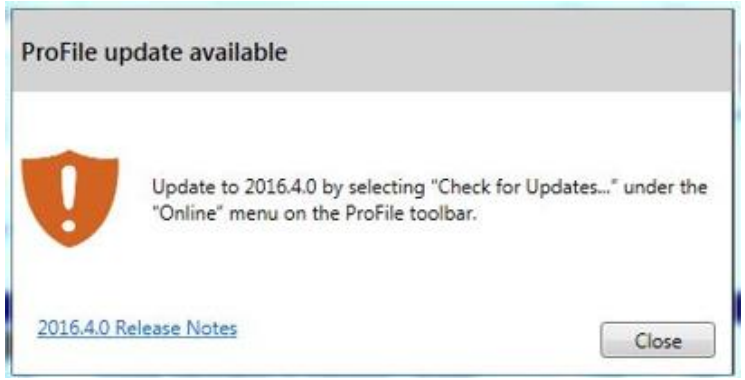
ProFile connects to the Internet to see if there are any available updates. If there are, you are prompted to download and install the newest update.

3. If no updates are available, click the **OK** button to close the window.


Intuit ProFile Automatic Check for Updates
There is an update to your copy of Intuit ProFile available for download.
Your Version: 2019.2.0
Latest Version: 2019.3.5
Network Administrators: Need a redistributable install program?
intuit profile
Sign In
Search the community...
I want to:
download the update
Download new updates without asking from now on.
skip the download for now
turn off this automatic update feature
OK
Cancel

# Using ProFile Notification Services

The ProFile notification service provides timely and important information directly to customers. This may include CRA announcements, ProFile releases and patches, or critical issues.

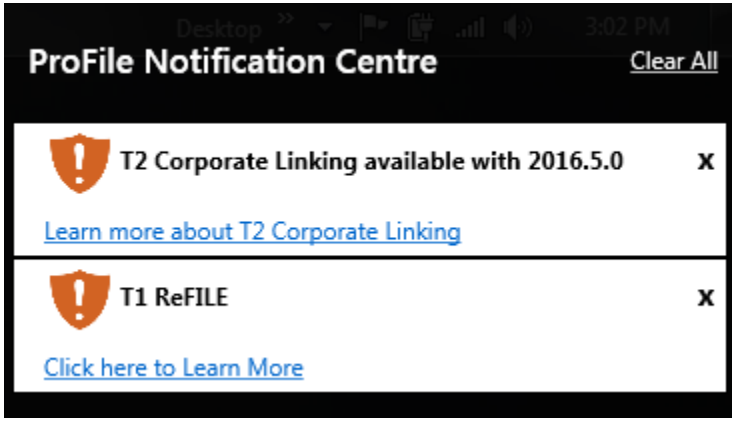

ProFile update available
Update to 2016.4.0 by selecting "Check for Updates..." under the "Online" menu on the ProFile toolbar.
2016.4.0 Release Notes
Close

### Start-Up Notifications

Start-Up notifications display when ProFile starts; they are often urgent messages that affect most or all preparers. They may include reminders of recent software updates, CRA changes, or notices of service interruptions.

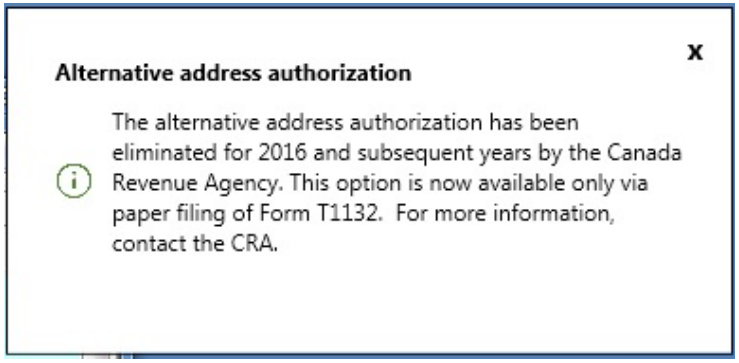
### ProFile in-application Notification Centre

The in-application Notification Centre displays within the ProFile application, usually on the right side of the ProFile window. It lists recent notifications in the sequence they arrive. Each can be deleted if the information is no longer relevant to the preparer.  Preparers can also turn the in-application Notification Centre to Off status to no longer see notifications in the application.


ProFile Notification Centre
Clear All
T2 Corporate Linking available with 2016.5.0
Learn more about T2 Corporate Linking
T1 ReFILE
Click here to Learn More

### Information Call-out

The Information Call-out highlights general, non-emergency information for ProFile customers. The call-out displays temporarily then removes itself from view.


Alternative address authorization
The alternative address authorization has been eliminated for 2016 and subsequent years by the Canada Revenue Agency. This option is now available only via paper filing of Form T1132.  For more information, contact the CRA.

# Using Options in ProFile

# Setting Environment Options in ProFile

ProFile users can set options for their ProFile working environment. This includes PDF settings, form settings, reminders, security, and more. Select the **Environment…** option from the **Options** drop-down menu in ProFile.

The following list includes the most-commonly used options:

**Edit tab**

The Edit tab includes options for common tasks, such as allowing predictive typing, date stamping, SIN validation, and capitalization.

**Display tab**

The Display tab includes options for the display of ProFile, including font scaling, tab icons, and page breaks.

**File tab**

The File tab includes options for setting file directories, managing recently used files, and auto-saving files.

**Preparer tab**

The Preparer tab allows preparers to insert their personal and firm information, including RepID, Group ID, and initials.

**Discounter tab**

The Discounter tab allows a discounter to insert their personal and firm information, including Discounter Registration Number.

**Trustee tab**

The Trustee tab allows trustees to insert their personal and firm information.

**Audit tab**

The Audit tab allows preparers to set audit and/or error styles, as well as establish standards to prevent a return from being prematurely filed.

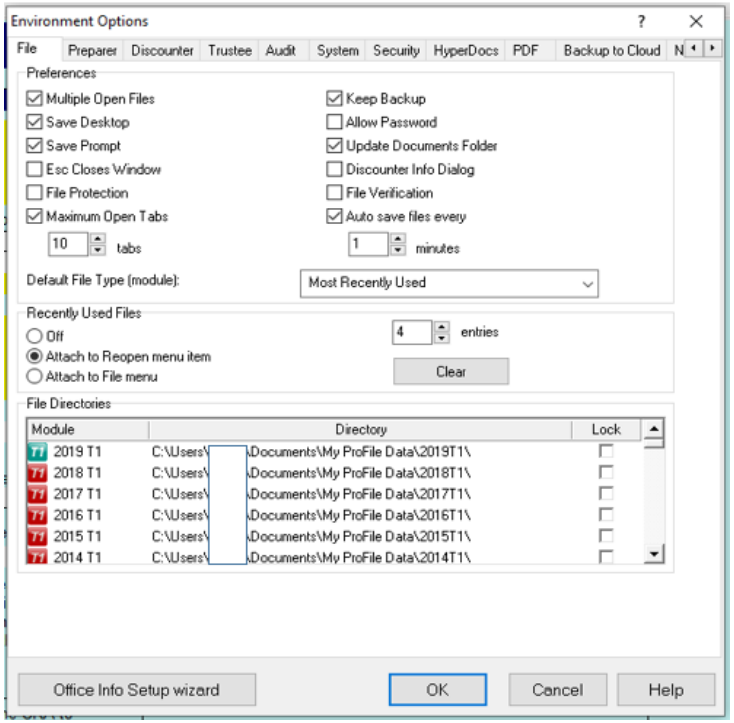
**System tab**

The System tab includes options for setting shared folders, checking for software updates, and utilizing online features.

**PDF tab**

The PDF tab allows preparers specify PDF characteristics for printed returns, PDF archive directories, and PDF security.

# Using File Pathing in ProFile




### About file pathing

ProFile users can set where their client's returns are stored. The file path can be changed or locked to prevent deletion or copying.

### Managing file paths:

1. Select the **Environment…** option from the **Options** drop-down menu in the toolbar.
2. Select the **File** tab in the **Environment Options** window.

Files paths display under the **File Directories** section of the window.

Files in the file path display in the corresponding directory in Explorer.

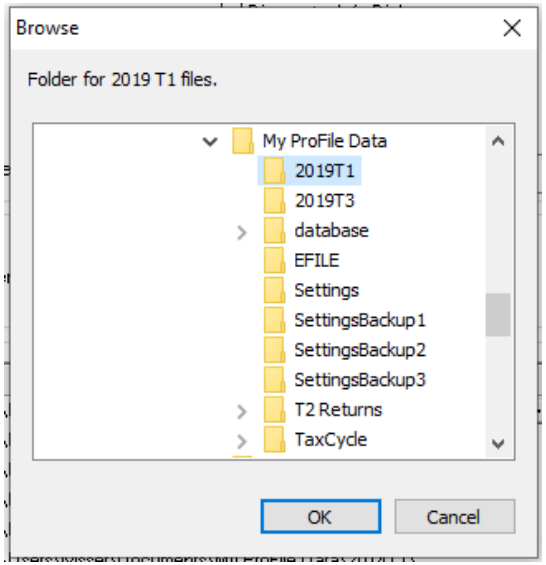
3. Click the **Lock** checkbox to lock the file path; the lock feature will default back to this file directory but can be changed even when locked.

### Changing file path:

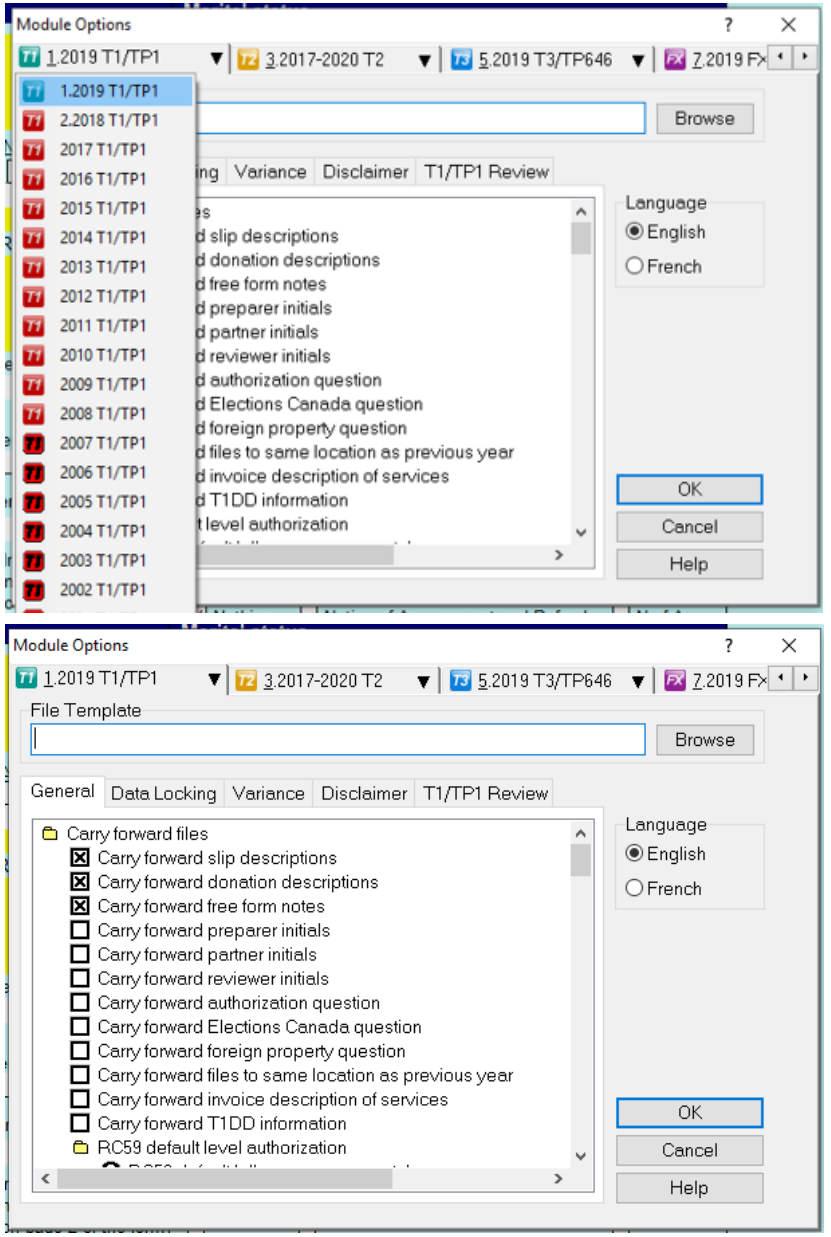
1. Click on the file directory to change.
2. Click the **Show path** ... button.

The **Browse** window explorer displays.

3. Select a new location from the **Browse** window; click the **OK** button.



# Using Module Options in ProFile




### Module options overview

ProFile users can set options for each tax module (for example, T1, T2, etc.) for which they are preparing returns.

Select the **Module…** option from the **Options** drop-down menu in the top toolbar.

### Setting module options

Each module tab includes an active down arrow; click the arrow to display the available tax years for the module display.

### Tabs

### General tab

The General tab includes options for carry-forward, individual forms, access, and more.

### Data Locking tab

The Data Locking tab allows preparers to set the criteria for locking a file. For instance, if the file carries forward or is transmitted.

### Variance tab

The Variance tab allows the setting of the Minimum Variance, using the criteria of Dollar and/or Percentage.

### Disclaimer tab

The Disclaimer tab includes the option to include a standard disclaimer on all prepared forms.

### T1/TP1 Review tab

The T1/TP1 Review tab allows the setting of the Variance Thresholds, using the criteria of Dollar and/or Percentage.

# Using Templates in ProFile

Templates allow preparers to save time and effort by creating commonly used communications that can be sent to one or more clients.

**Selecting templates:**

1. Select the **Templates** option from the **Options** drop-down menu in the top toolbar.

The **Template Editor** window displays.

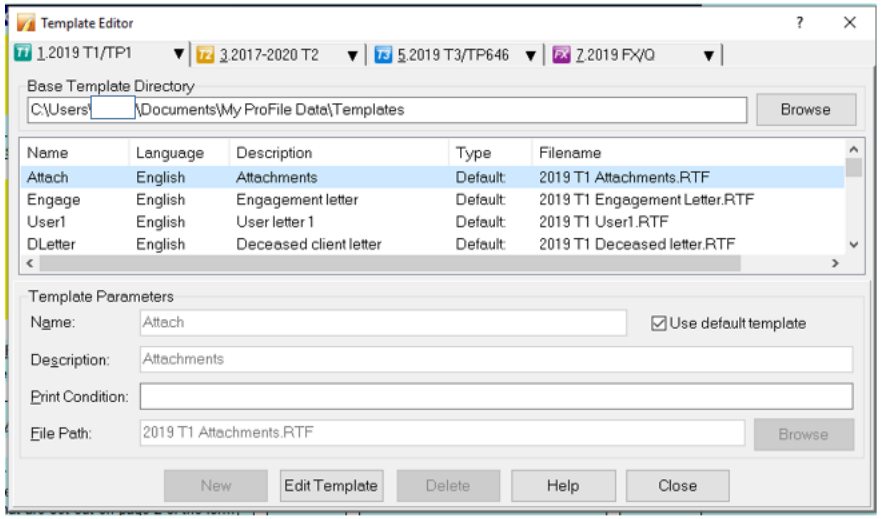
**Using templates**

The template list includes the most-common communications required by preparers including engagement letters, client invoices, and payment emails.

Both French and English templates are provided.

1. Double-click any template; the template opens in the editor pane.
2. Edit the template required and save for future use or additional editing and customization.

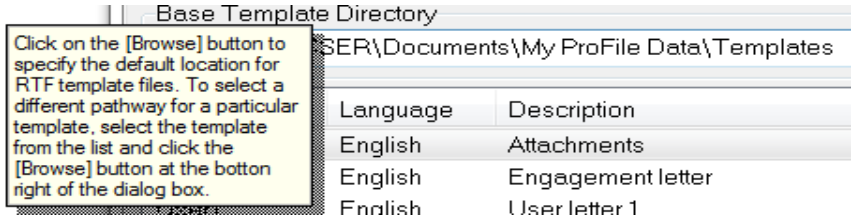
**Tip:** Press **F1** on any field in the Template Editor to learn more about its function.



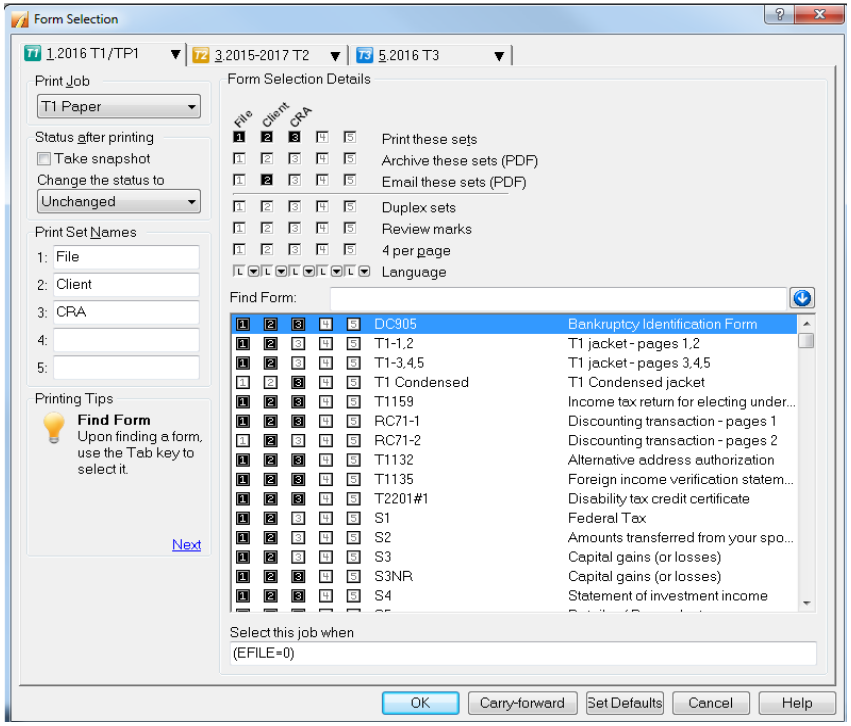

I, {ClientFirstName} {ClientLastName}, authorize the trustee, {DC905.s[1]}, to complete and file with the Canada Revenue Agency (CRA), my post-bankruptcy income tax return for the tax year {TaxConstant("CurrentTaxYear")}.
Also, I authorize the CRA to send to the trustee any refund resulting from the assessment or reassessments of my post-bankruptcy income tax return, and to have that refund included with my property to be distributed under section 67 of the *Bankruptcy and Insolvency Act*.

(bankrupt's signature)

SIN: {DC905.S[12]}


Base Template Directory
SER\Documents\My ProFile Data\Templates
Click on the [Browse] button to specify the default location for RTF template files. To select a different pathway for a particular template, select the template from the list and click the [Browse] button at the botton right of the dialog box.
Language
Description
English
Attachments
English
Engagement letter
English
User letter 1

# Using Form Selection in ProFile




### Form selection overview

The Form Selection menu allows preparers to set print options for forms.

### Selecting templates:

1. Select the **Form Selection** option from the **Options** drop-down toolbar menu.

The **Form Selection** menu displays.

### Using form selection

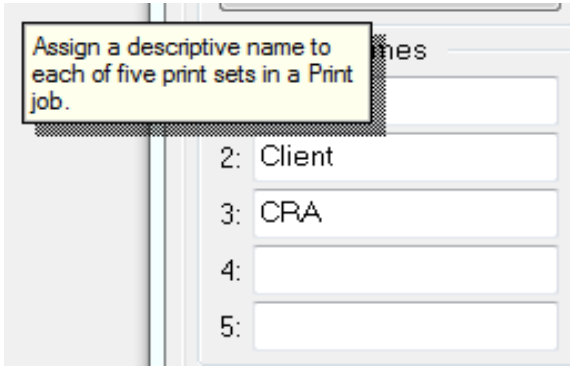
A list of print options displays in the **Form Selection** menu.

This list includes the ability to set the print options for **File**, **Client**, and **CRA**. Individual forms are listed, including the option for setting language.

Toggle any box to activate a print option for the particular form.

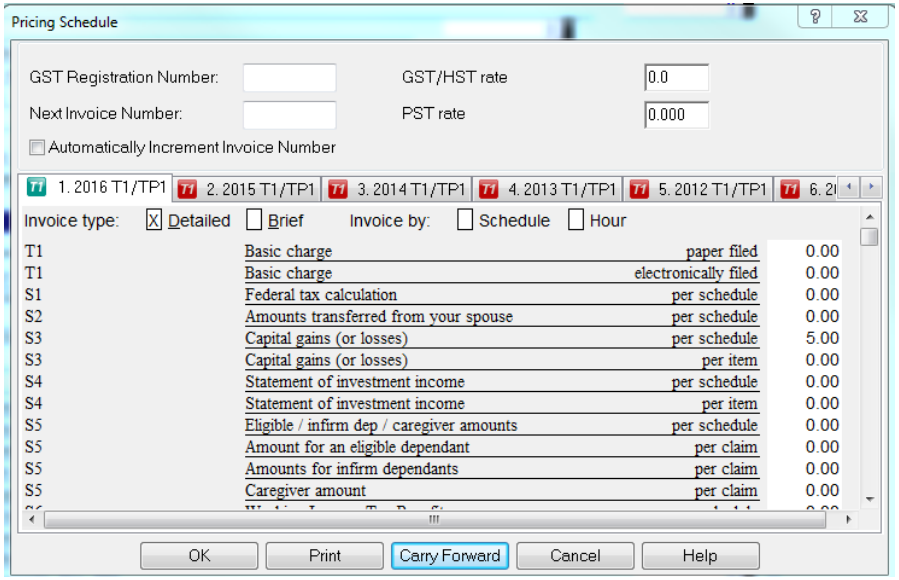
At any time, you can restore your defaults by clicking the **Set Defaults** button.

**Tip:** Press **F1** on any field to learn more about its functionality.



# Setting Pricing in ProFile

The ProFile pricing feature provides a convenient method for preparers to set costs and bill clients for services.


Pricing Schedule
GST Registration Number:
GST/HST rate
0.0
Next Invoice Number:
PST rate
0.000
Automatically Increment Invoice Number
1. 2016 T1/TP1
2. 2015 T1/TP1
3. 2014 T1/TP1
4. 2013 T1/TP1
5. 2012 T1/TP1
Invoice type: Detailed Brief Invoice by: Schedule Hour
T1 Basic charge paper filed 0.00
T1 Basic charge electronically filed 0.00
S1 Federal tax calculation per schedule 0.00
S2 Amounts transferred from your spouse per schedule 0.00
S3 Capital gains (or losses) per schedule 5.00
S3 Capital gains (or losses) per item 0.00
S4 Statement of investment income per schedule 0.00
S4 Statement of investment income per item 0.00
S5 Eligible / infirm dep / caregiver amounts per schedule 0.00
S5 Amount for an eligible dependant per claim 0.00
S5 Amounts for infirm dependants per claim 0.00
S5 Caregiver amount per claim 0.00
OK
Print
Carry Forward
Cancel
Help

**Getting started with pricing:**

1. Select the **Pricing…** option from the **Options** drop-down menu in the top toolbar.

The **Pricing Schedule** window displays.

**Pricing options:**

1. Select the module for which to set pricing options for (for example, T1). The current and previous tax year pricing displays.
2. Enter information for the GST registration number, invoice number, and GST/HST/PST rate.
3. Select the invoice type: **Detailed**, or **Brief**.
4. Select the invoice methodology: by **Schedule** or **Hour**.
5. Insert **costs for services** (for example, basic charge, capital gains, etc.)
6. Click the **OK** button to save the pricing information.

**Carry forward pricing:**

ProFile lets preparers carry forward pricing from previous tax years to the current tax year.

1. Select the previous tax year (for example, **2019 T1/TP1**). Review the pricing for services.
2. If the same pricing is to apply to the current tax year, click the **Carry Forward** button.
3. Click **OK** when asked to carry forward prices to the current tax year.

The previous tax year pricing displays in the current tax year. It can be changed at any time.

# Using Flexible Licensing in ProFile

Flexible licensing temporarily suspends a ProFile license on one computer in order for the license to be activated on another computer... without having to delete the license or purchase an additional seat.

For example, you can suspend your Profile license on an office computer and activate the same Profile license on a laptop in order to meet with clients in the field. When you return to the office, simply suspend the license on the laptop and resume the license on your office computer.

**What is a Seat?**

The number of seats determines the maximum number of users that can be activated on the Product Code and License Key combination. When you purchase a base license, you get one seat. When you purchase additional licenses, you get an increase to the number of seats that can be activated on your license.

**What is required to use Flexible Licensing?**

Flexible licensing requires:

- Tax year 2016 or later license (earlier tax years are not supported at this time)
- ProFile version 2016.0.3 or later
- Internet connection during activation and suspension of license

**Can I still work offline?**

Yes. Once you have activated your license you can use ProFile without an Internet connection. Features like **Auto-fill my return** and EFILE will still require an Internet connection to work.

**What does Flexible Licensing cost?**

There is no cost for flexible licensing. The feature is included as part of your license purchase.

**How many machines can I install ProFile on?**

Unlimited. ProFile is a free download, but the licensing determines what can be done with the program. You can add your licenses to as many computers as you wish with flexible licensing, but you can only have the number of licenses that you paid for active at the same time.

**Is Flexible Licensing going to be ON by default?**

No. The flexible licensing option is activated manually.

# Flexible Licensing: Enable during Activation

Flexible Licensing can be enabled during the ProFile activation sequence, for preparers who want to start using the feature right away.

**Enabling Flexible License during Activation:**

1. Enter your product code and license key during activation.
2. Click the **Next - Setup Flexible Licensing** button.

The **Flexible Licensing Settings** window displays.

3. Click the **Enable flexible licensing on this computer** check box. Select either the **Manual** or the **Automatic** mode button to activate your choice.
4. The Manual mode displays the choice of two additional options:
    - **Prompt me every time when I close ProFile** – selecting this option results in ProFile prompting the user to suspend your license when closing the application
    - **Don't prompt me. I'll do it manually** – selecting this option requires the user to suspend their license manually themselves when closing the application
5. Click the **Save** button to save your preferences.

ProFile Flexible Licensing Settings
intuit ProFile
Flexible Licensing Settings
You can update your settings for Flexible Licensing below. Click save to update your settings.
Flexible licensing allows you to temporarily suspend your tax year 2016 ProFile license from one computer so you can use it on another computer. Learn More
Enable flexible licensing on this computer
Manual - This option will require you to confirm that you would like to suspend your ProFile licenses when you close ProFile.
Pick one
Prompt me every time when I close ProFile
Don't prompt me. I'll do it manually.
Automatic - This option will automatically suspend and activate your licenses when you open and close ProFile.
You can access these settings by clicking the Help > Configure Flexible Licensing menu item above.
Please Note: In order for this functionality to work your computer must be connected to the internet.
Save

# Flexible Licensing: Suspending the License Automatically

The Automatic mode automatically suspends or activates your licenses when you close and open ProFile, respectively.

**Note:** A working Internet connection is required to suspend a license.

ProFile Flexible Licensing Settings
intuit ProFile
Flexible Licensing Settings
You can update your settings for Flexible Licensing below. Click save to update your settings.
Flexible licensing allows you to temporarily suspend your tax year 2016 ProFile license from one computer so you can use it on another computer. Learn More
Enable flexible licensing on this computer
Manual - This option will require you to confirm that you would like to suspend your ProFile licenses when you close ProFile.
Pick one
Prompt me every time when I close ProFile
Don't prompt me. I'll do it manually.
Automatic - This option will automatically suspend and activate your licenses when you open and close ProFile.
You can access these settings by clicking the Help > Configure Flexible Licensing menu item above.
Please Note: In order for this functionality to work your computer must be connected to the internet.
Save

**Suspending the License Automatically:**

1. Select the **Configure Flexible Licensing** option from the **Help** drop-down menu in the top toolbar.

The **Flexible Licensing Settings** window displays.

2. Click the **Enable flexible licensing on this computer** box.
3. Select the **Automatic** mode button.
4. Click the **Save** button to save your preferences.
5. Close the ProFile application, either by clicking the **X** icon on the application or by selecting the **Exit** option under the **File** menu.

The ProFile application closes.

6. A message displays indicating that your license is suspended on the computer.

# Flexible Licensing: Suspending the License Manually

Manual suspension occurs when the user suspends the licensing themselves in ProFile.

**Note:** This process needs to be undertaken each time ProFile is closed to ensure the Flexible Licensing is properly suspended. Proper suspension ensures the license can be activated on another computer.

Suspend Licenses
X
Would you like to suspend and work from another computer?
If you do not want to see this message every time you can change your flexible license settings here. Change Settings
*Please Note: In order for this functionality to work your computer must be connected to the Internet
No
Yes

**Suspending the License Manually:**

1. Save any files being used in ProFile.
2. Click the **X** icon in the top-right corner of ProFile or select the **Exit** option under the **File** drop-down menu.

A prompt displays asking if you would like to suspend your license and work on another computer.

3. Select the **Yes** option.

A message displays, confirming the license suspension can proceed.

A confirmation message displays when the license is suspended.

# Using the Client Explorer Database in ProFile

# Setting Client Explorer as the ProFile Database

ProFile users can set and use Client Explorer as the database when preparing client returns.

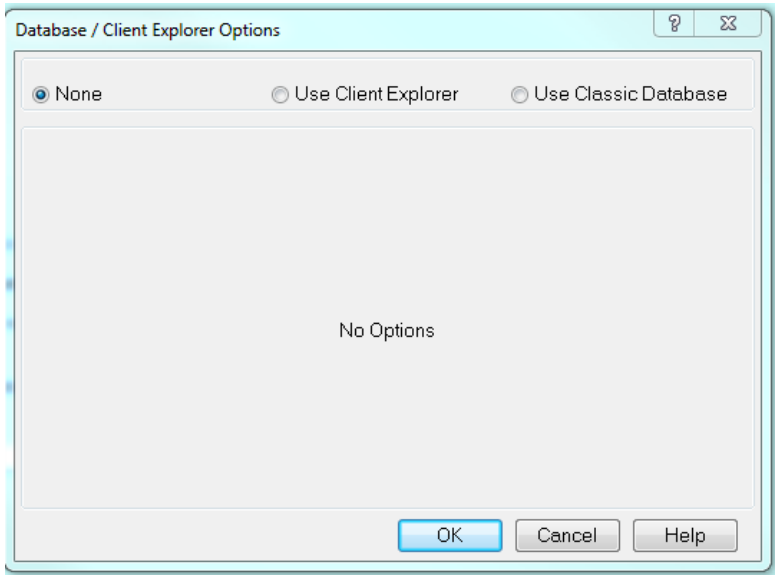
**Setting Client Explorer as database:**

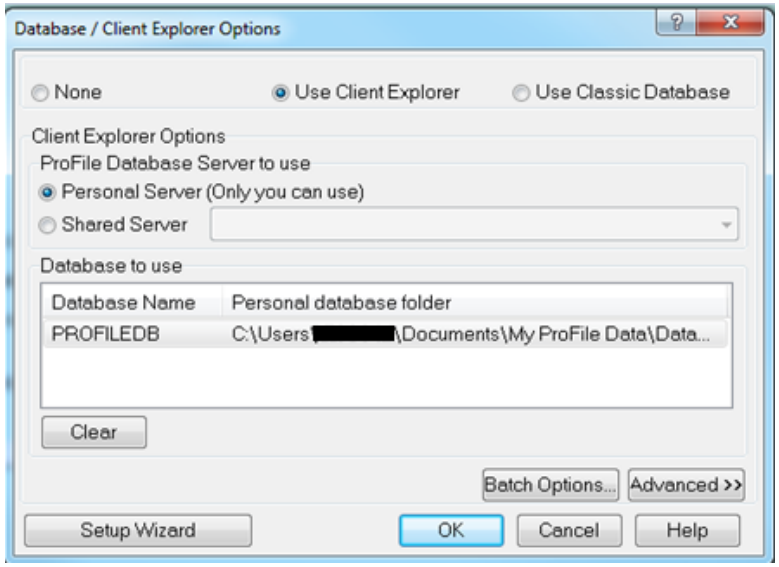
1. Open ProFile.
2. Select the **Database** option from the **Options** drop-down menu in the top toolbar.

The **Database/Client Explorer Options** window displays.

3. Select the **Use Client Explorer** option; the Client Explorer menu displays.
4. Select the **Personal Server** or **Shared Server option.**
5. Select the folder path if a shared server is being used.
6. Click the **Setup Wizard** button to create a shared server.
7. Click the **Advanced button** to explore additional options, including the handling of clients with no SIN.
8. Click the **OK** button when completed.

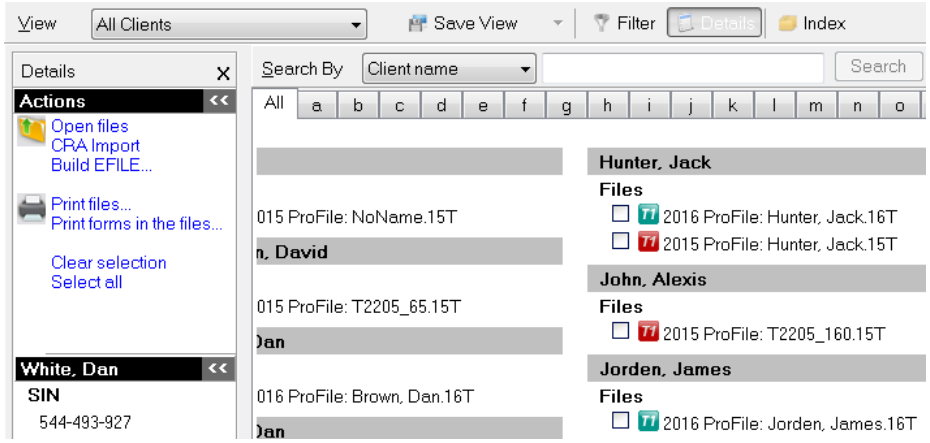
The Client Explorer is set as the database option.



# Using Filters in Client Explorer

By default, the Client Explorer displays all files regardless of the type of return, taxation year, or status. Filters allow the display of only those files that meet the criteria preparers set, such as those which have been filed or those which are still outstanding.




**Viewing Filter options:**

1. Select the **Client Explorer** option from the **Goto** drop-down menu in the top toolbar.

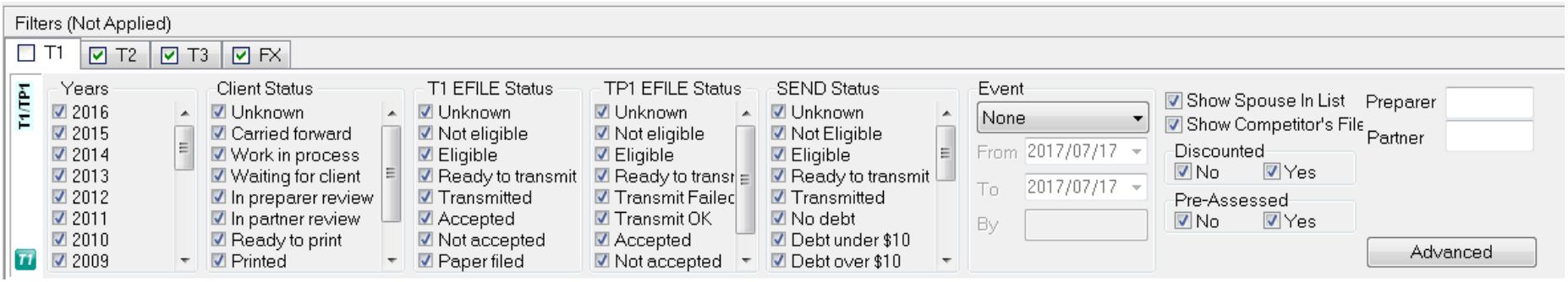
A list of all available returns for clients displays.

2. Click the **Filter** button.

The filter window displays at the bottom of the ProFile program. The filter pane contains all filter options for clients and their returns.

Options for filtering display in individual tabs and include:

- Available tax years
- Modules (for example, T1, T2, etc.)
- Client Status
- EFILE status
- SEND status
- EVENT



# Using Filters in Client Explorer, Continued

**Using Filters in Client Explorer: T1 EFILE Filtering Example:**

Example: Filter for only T1 returns that are completed and ready to EFILE.

1. Select the **Client Explorer** option from the **Goto** drop-down menu in the top toolbar.
2. Click the **Filter** button; the filter window displays at the bottom of the window.

**Selecting forms:**

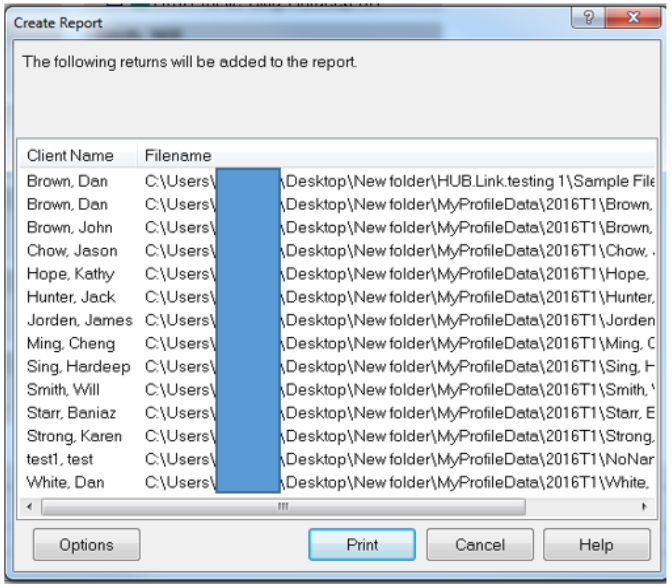
1. Select the checkbox on the **T1** tab and clear the other module tabs by unchecking them. This displays only T1 forms.
2. Select the checkbox for the current year (for example, **2019**) on the **T1** tab and clear the checkboxes for all other years by unchecking them. This displays only the 2019 tax year.
3. Select the checkbox for **Carry Forward** in the **Client Status** column and clear the other statuses by unchecking them. This displays only those returns in the carry forward state.
4. Select the checkbox for **Eligible** in the **T1 EFILE Status** column and clear the other statuses by unchecking them. This displays only those returns in the "eligible" state.

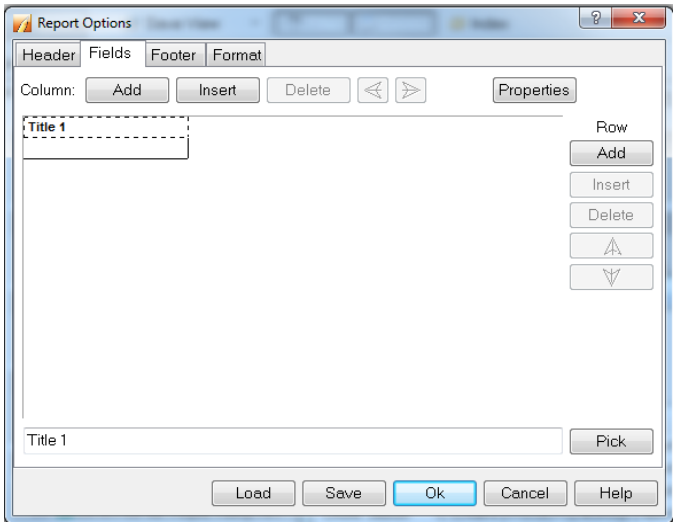
**Applying filters:**

1. Click the **Apply Filters** button.
2. Click the **All** tab in the Client view.

The current year T1 files that are eligible for EFILE display.

# Printing Reports in Client Explorer




The Client Explorer's report function allows preparers to print data from ProFile returns.

**Note:** A query applies only to returns of a single type (for example, 2019 T1 returns).

**Setting Client Explorer Report Parameters and Data:**

1. Open **Client Explorer** in ProFile.
2. Filter returns by the necessary parameters (for example, tax year, module, status, etc.).
3. Select the **Select All** option under the **Database** drop-down menu in the top toolbar.
4. Select the **Print Report** option under the **Database** drop-down menu; the **Create Report** window displays.
5. Click the **Options** button; the **Report Options** window displays.
6. Select the **Fields** tab.

The options display for creating a report, including column, rows, titles, and organization of report content.

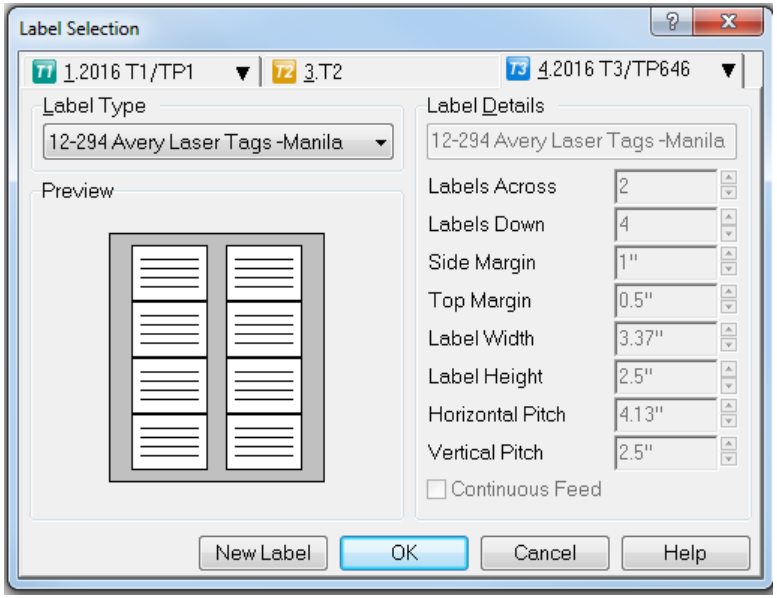
7. Select the data to be listed under each report heading.

**Running a Client Explorer report:**

1. Click the **Save** button in the **Report Options** window; the report parameters save.
2. Click the **OK** button; the **Report Options** window closes.
3. Click the **Print** option from the **Create Report** window.

The report compiles and is sent to the designated printer.

# Using Mailing Labels in Client Explorer




ProFile's Client Explorer provides preparers with a simple and convenient method for printing mailing labels.

**Choosing a mailing label:**

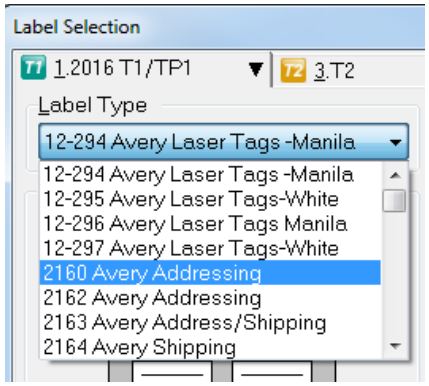
1. Select the **Setup Mailing Labels…** option from the **File** drop-down menu in the top toolbar.

The **Label Selection** window displays.

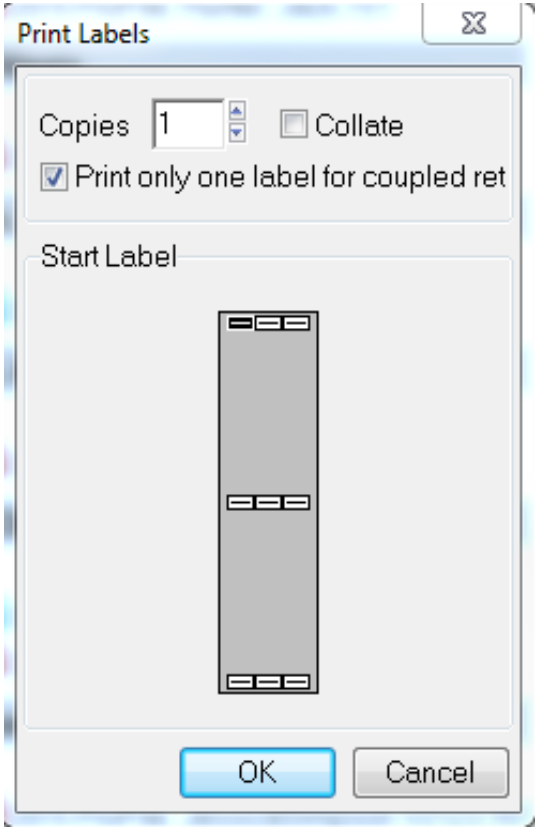
2. Select the return type (for example, **T1**) and tax year (for example, **2019**) from the tab menu.
3. Select the **Label Type** from the drop-down menu.

**Creating a new mailing label:**

1. Click the **New Label** button; the **Label Details** fields activate and populate.
2. Enter the specific measurements for the label in the **Label Details** fields.
3. Save the name of the new label in the **Label Details** field (for example, **T1 2019 Label**).
4. Click the **OK** button; the label saves and the window closes.



# Using Mailing Labels in Client Explorer, Continued



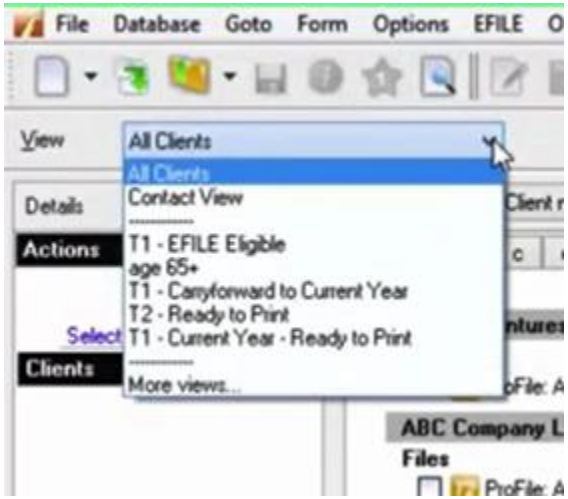

**Printing mailing labels:**

1. Open the **Client Explorer** database in ProFile.
2. Select the client for which the label will apply.
3. Select the **Print Mailing Labels** option under the **Database** drop-down menu in the top toolbar; the **Print Labels** window displays.
4. Select the number of labels to print under the **Copies** field.
5. Select the checkbox for **Print only one label for coupled return?** if required.
6. Click the **OK** button; the label(s) print.

# Batch EFILE in Client Explorer

ProFile users can build and EFILE files to CRA for multiple clients and returns at once. Doing so creates a "batch", a set of individual and client files ready for EFILE, which ProFile sends to CRA or RQ all at once.

**Batch and transmit files:**




1. Open **Client Explorer** in ProFile.
2. Select the type of EFILE operation to perform from the drop-down menu; ProFile filters the list of files to reflect only those with the selected status (for example, **T1 - EFILE Eligible**).

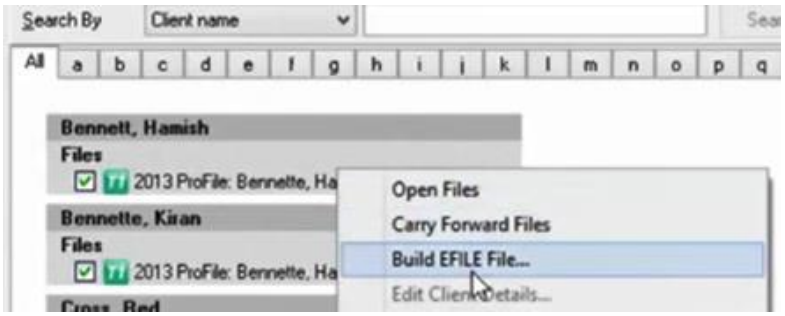
The list of eligible files displays.

3. Select the files to include in the batch transition.
4. Right-click on the selected files and select **the Build EFILE File…** option from the menu.

The build window displays.

5. If necessary, specify the type of EFILE file to create, or the agency, data type, or slip type.
6. Click the **OK** button.

The EFILE files build; the build status of each return displays as **Successful** or **Failed**.




7. Click the red **X** to display the issue with the **Failed** return. Click the **Transmit now** button; the files transmit to CRA; you can also select the **Transmit later** option.

# Batch EFILE in Client Explorer, Continued

**Transmit batch files at a later time:**

1. Select the **Transmit later** button when prompted during the batch process.
2. When ready to EFILE, select the **EFILE Online Batch** option from the **EFILE** drop-down menu in the top toolbar.

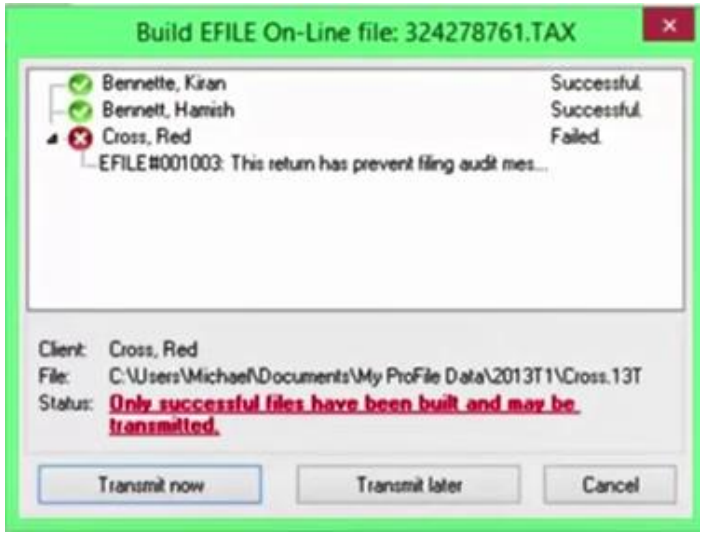
ProFile searches the EFILE folder and sub-folders for any unsent transmission files and displays those meeting the criteria.

3. Select the files to EFILE and click the **OK** button.

The EFILE files build; the build status of each return displays as **Successful** or **Failed**.

4. Click the red **X** to display the issue with the **Failed** return.

**Note:** CRA stipulates a two-second pause between the EFILE of each file; this may result in a slower-than-expected process to EFILE for customers with a large number of files in a batch.



# Carry Forward TaxCycle Returns in ProFile

# Carry Forward TaxCycle Returns in ProFile

**What years are supported for conversion?**

T1 module supports T1 2018 files. T2 module supports T2 2016 and later files.

**Is there a limit on how many files can be converted?**

There is no limit on how many files can be converted.

**Who can convert TaxCycle client files to ProFile?**

File conversion is available to current year customers only.

**How long will it take to convert my client files to ProFile?**

In most cases client files are migrated within an hour, depending on the number of client files uploaded. Users receive an email from ProFile indicating when the conversion is complete.

**What data gets converted during the conversion process?**

The conversion process does not produce a complete or accurate prior year tax return for side-by-side comparison. ProFile converts pertinent data to next year's tax return; conversion is not a 1:1 transfer of data to reproduce the same tax return for the same year.

The converted files provide a starting point intended to be transferred to the next year's tax program and the data in the converted file should not be changed in the prior year tax program.

**How is this different from other carry forwards?**

TaxCycle carry forward works differently from other carry forwards. A technology is used that allows for faster field mappings and an improvement in comparison between TaxCycle and ProFile returns. The result is a faster and more-accurate carry forward experience.

**How long are my client files saved on Intuit's network?**

Client data is used for conversion purposes only. After the data is converted, a copy is maintained for conversion backup purposes and is destroyed after a 30-day period.

Ensure you download your files within 30 days of conversion or you will need to repeat the conversion process. See section "Download converted client data" below for the steps in the download process.

**Why were some of my files not converted?**

There can be several reasons why a TaxCycle client file did not convert:

## Carry Forward TaxCycle Returns in ProFile, Continued

- The file may not have been in the correct folder
- The file may have been locked or password-protected
- The file may be corrupted
- The file may be missing critical data

The affected files can be corrected and resubmitted.

**What fields are supported and unsupported?**

Supported fields include:

- All taxpayer information, including taxpayer, spouse, dependents, corporation, etc.
- All-important carryover amounts that can be obtained
- 5-year, comparative summary, installments schedule
- Capital cost allowance
- Loss carryover amounts

Unsupported fields include:

- Quebec TP1 and CO17 tax information
- Amounts that are not relevant to next-year tax preparation
- Some provincial credit carry forward amounts

# Carry Forward TaxCycle Returns in ProFile, Continued

**Copying TaxCycle client data:**

1. Create a new folder under your computer's C: drive titled **conversiondata**. This folder may already exist on your C: drive if you have already updated ProFile to version 2019.2.0 or later.
2. Navigate to the folder containing the TaxCycle client files to carry forward. You can find this location under **Options > Files and Folders** in your TaxCycle software.
3. Remove any locks or password protection from the files to carry forward.
4. Copy and paste the files to carry forward to the new C:\conversiondata folder you created.

**Submit client data for carry forward:**

1. Click the **File** menu in ProFile.
2. Select the **Submit Client Data for Carry Forward…** option under the **TaxCycle Carry Forward…** menu.

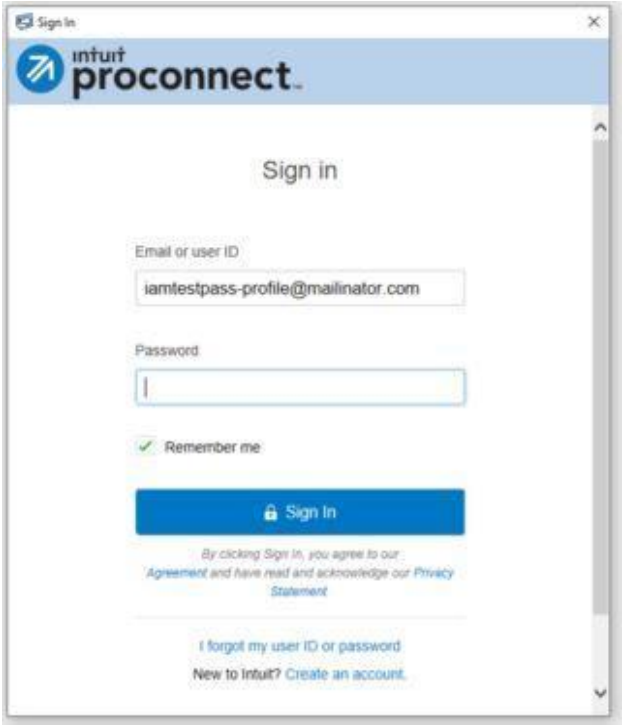
The **Sign In** window displays.

3. Sign in to your ProFile account.

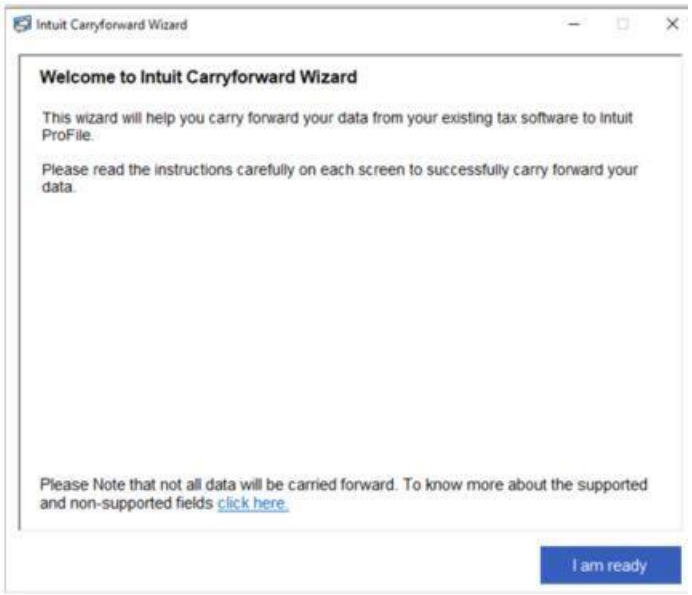
If you do not yet have a ProFile account, click the **Create an account** link at the bottom of the **Sign In** window.

**Note:** You may be prompted to log in to your ProFile account a second time during the conversion process: this is a normal behavior.

A secure connection is established.



# Carry Forward TaxCycle Returns in ProFile, Continued

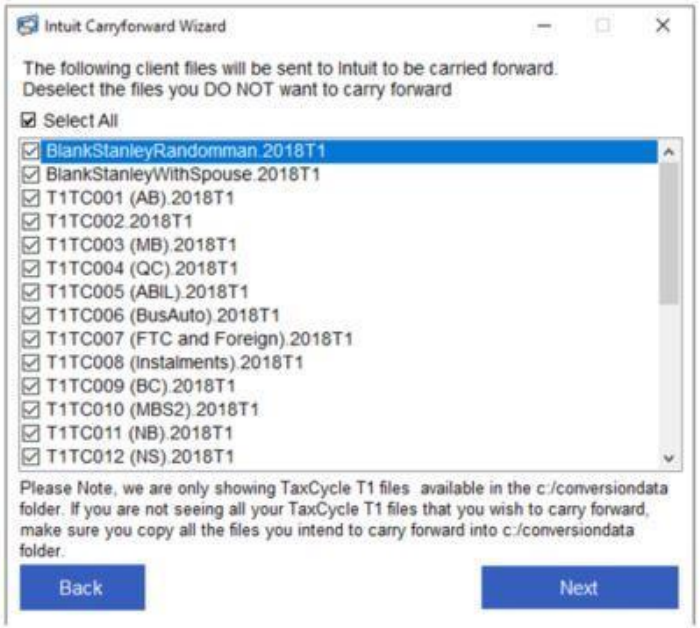

Intuit Carryforward Wizard
Welcome to Intuit Carryforward Wizard
This wizard will help you carry forward your data from your existing tax software to Intuit ProFile.
Please read the instructions carefully on each screen to successfully carry forward your data.
Please Note that not all data will be carried forward. To know more about the supported and non-supported fields click here.
I am ready

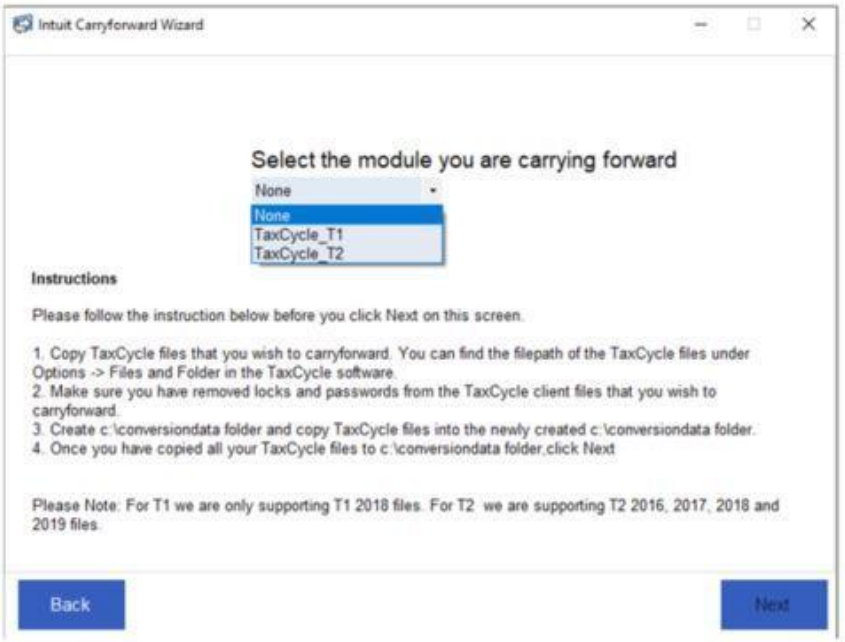
The **Intuit Competitor Carryforward Wizard** displays.

4. Click the **I am ready** button to proceed. The module selection window displays.
5. Select the applicable module from the drop-down menu, corresponding to the files to undergo conversion for the carry forward process (for example, **TaxCycle T1**).

**Note:** Each module's files must be converted separately; it is not possible to convert T1 and T2 files at one time.

6. The carry forward wizard reads and displays files matching the selected module from the **C:/conversiondata** folder.
7. Select all files to undergo conversion prior to carry forward.


Intuit Carryforward Wizard
The following client files will be sent to Intuit to be carried forward.
Deselect the files you DO NOT want to carry forward
Select All
BlankStanleyRandomman.2018T1
BlankStanleyWithSpouse.2018T1
T1TC001 (AB).2018T1
T1TC002.2018T1
T1TC003 (MB).2018T1
T1TC004 (QC).2018T1
T1TC005 (ABIL).2018T1
T1TC006 (BusAuto).2018T1
T1TC007 (FTC and Foreign).2018T1
T1TC008 (Instalments).2018T1
T1TC009 (BC).2018T1
T1TC010 (MBS2).2018T1
T1TC011 (NB).2018T1
T1TC012 (NS).2018T1
Please Note, we are only showing TaxCycle T1 files available in the c:/conversiondata folder. If you are not seeing all your TaxCycle T1 files that you wish to carry forward, make sure you copy all the files you intend to carry forward into c:/conversiondata folder.
Back
Next

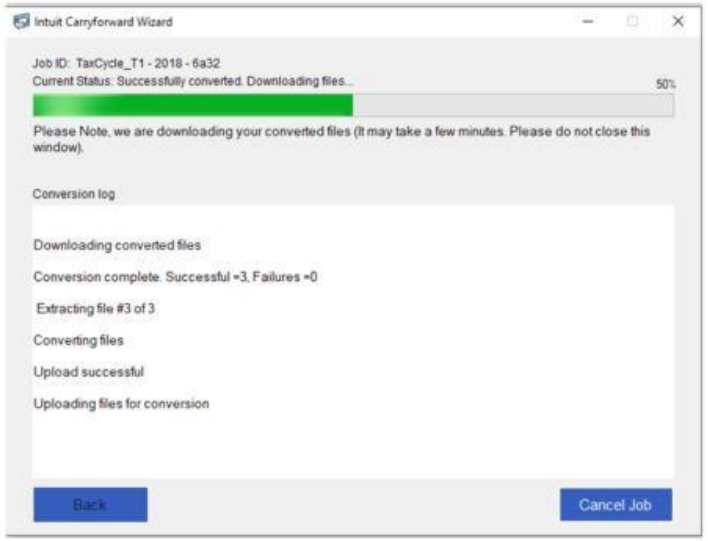

Intuit Carryforward Wizard
Select the module you are carrying forward
None
None
TaxCycle_T1
TaxCycle_T2
Instructions
Please follow the instruction below before you click Next on this screen.
1. Copy TaxCycle files that you wish to carryforward. You can find the filepath of the TaxCycle files under Options -> Files and Folder in the TaxCycle software.
2. Make sure you have removed locks and passwords from the TaxCycle client files that you wish to carryforward.
3. Create c:\conversiondata folder and copy TaxCycle files into the newly created c:\conversiondata folder.
4. Once you have copied all your TaxCycle files to c:\conversiondata folder,click Next
Please Note: For T1 we are only supporting T1 2018 files. For T2 we are supporting T2 2016, 2017, 2018 and 2019 files.
Back
Next

# Carry forward TaxCycle returns in ProFile, Continued

**Note:** Only files in the **C:/conversiondata** folder display for selection. If you do not see a file that should be converted, ensure it has been copied to the folder.

8. Click the **Next** button; the selected files begin conversion. Most jobs will complete within minutes, so you can minimize this window and work in ProFile as the upload/conversion takes place.

ProFile emails a notice that conversion has begun.


Intuit Carryforward Wizard
Job ID: TaxCycle_T1 - 2018 - 6a32
Current Status: Successfully converted. Downloading files...
50%
Please Note, we are downloading your converted files (It may take a few minutes. Please do not close this window).
Conversion log
Downloading converted files
Conversion complete. Successful =3, Failures =0
Extracting file #3 of 3
Converting files
Upload successful
Uploading files for conversion
Back
Cancel Job

9. You can click the **Cancel Job** button at any time to cancel the conversion. Conversion may take several minutes depending on file size and the number of files being converted.

A progress bar displays conversion progress.

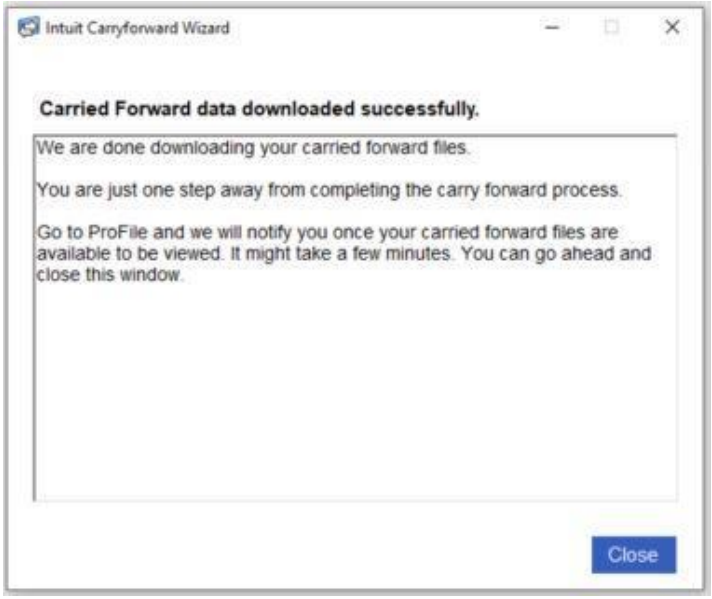
A **Conversion complete** message displays when the files are successfully converted.

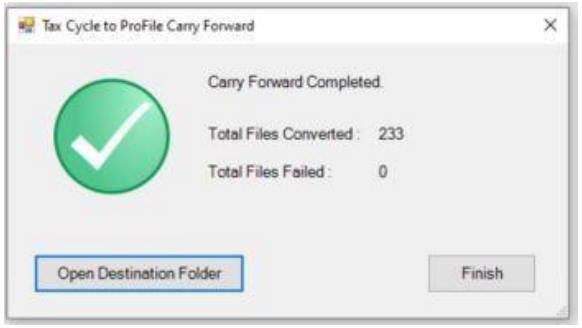
ProFile converts the TaxCycle files to a ProFile-compatible format.

ProFile emails a notice that conversion is complete.

10. Click the **Close** button.

The **Conversion summary window** displays.


Intuit Carryforward Wizard
Carried Forward data downloaded successfully.
We are done downloading your carried forward files.
You are just one step away from completing the carry forward process.
Go to ProFile and we will notify you once your carried forward files are available to be viewed. It might take a few minutes. You can go ahead and close this window.
Close



# Carry forward TaxCycle returns in ProFile, Continued

11. Click Open **Destination Folder** to review the converted files in the TaxCycle folder; the location will be **C:\Users\[local user]\Documents\My ProFile Data\TaxCycle\[module].**

12. Click **Finish**.

**Note:** It is not possible to customize the file path destination for the input (the conversion data folder) or the output (My ProFile Data\TaxCycle) folders at this time. If you need to save files on a network or other location, you must move them to the desired location following the conversion.

You may now open the client files in ProFile for further work or electronic filing.

Review our full support article for information on troubleshooting errors and downloading converted client data.

# Batch Carry Forward Files

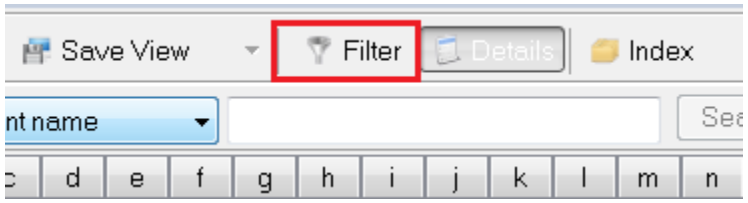
Carry forward of batch files is an option available in ProFile that easily brings previous year's returns forward into the current module.

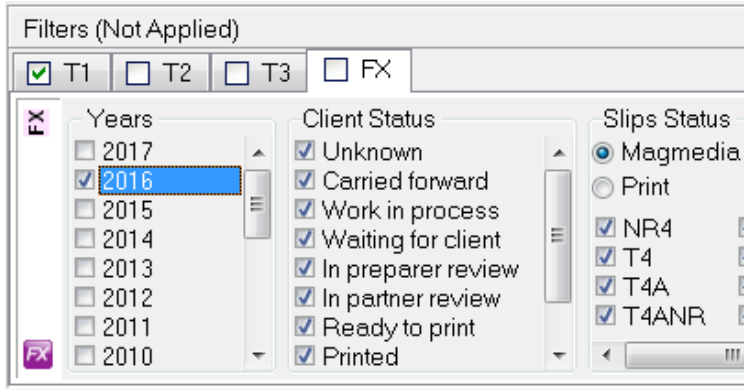
1. Open **Client Explorer** in ProFile.

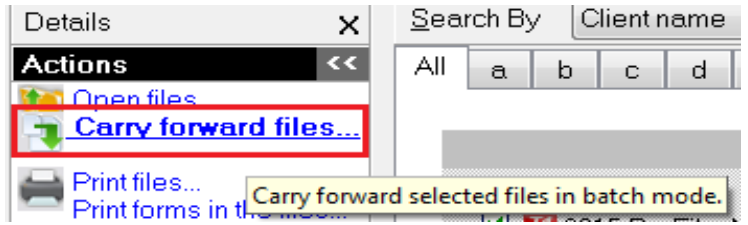
Client Explorer displays a list of tax return files.

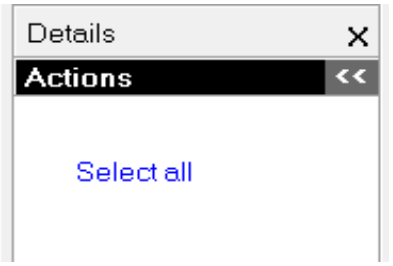
2. Click on the **Filter** button; the filter menu displays at the bottom of the Client Explorer window.
3. Select files to carry forward (for example, **all T1 files**) and the previous year (for example, **2019**) from the checkbox menu.
4. Click the **Apply Filters** button; the filter displays all files meeting the selected criteria.
5. Click the **Select All** link on the left-side menu; all files select.
6. Click the **Carry Forward Files** option on the left-side menu.

The files carry forward.

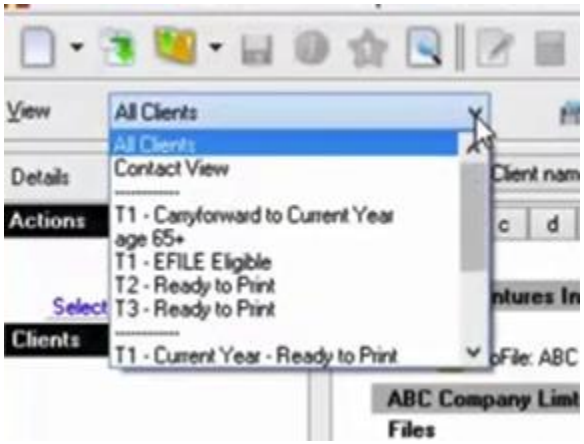


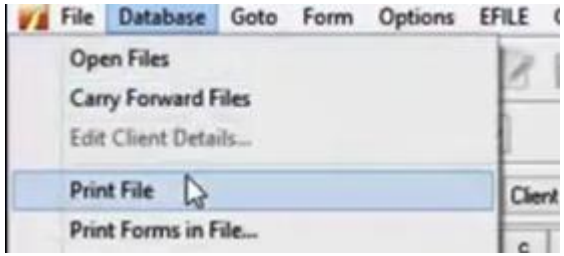
# Batch Printing Forms in Client Explorer




It is easy to print pre-configured print sets for multiple clients at the same time.

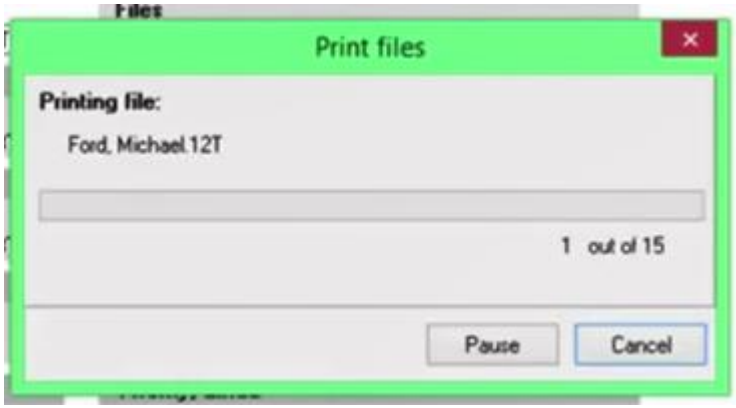
**Printing forms for a group of clients:**

1. Open **Client Explorer**.
2. Select the designation for clients in the drop-down list (for example, **T1 - EFILE Eligible**); the clients matching the designation displays.
3. Select the clients to batch print.
4. Select the **Print file** option from the **Database** drop-down menu.




ProFile automatically selects the forms to print for each file based on the print job and print setting options configured in the **Form selection** window. For example, ProFile detects that each client selected will receive an “overdue invoice” letter.

The files print.



# Batch Printing Forms in Client Explorer, Continued

**Printing the same forms from each file:**

It is simple to print the same form for multiple clients at once in a batch. For example, a ProFile user may want to print a form for each client so that it can be mailed for the client's signature.

**Note:** When printing forms from multiple clients at the same time, you can print only forms from files of the same module and year.

**Printing forms:**

1. Select the designation for clients in the drop-down list (for example, **T1 - EFILE Eligible**); the clients matching the designation displays.

2. Right-click in the client list and choose the **Select All** option from the menu.

All forms are selected.

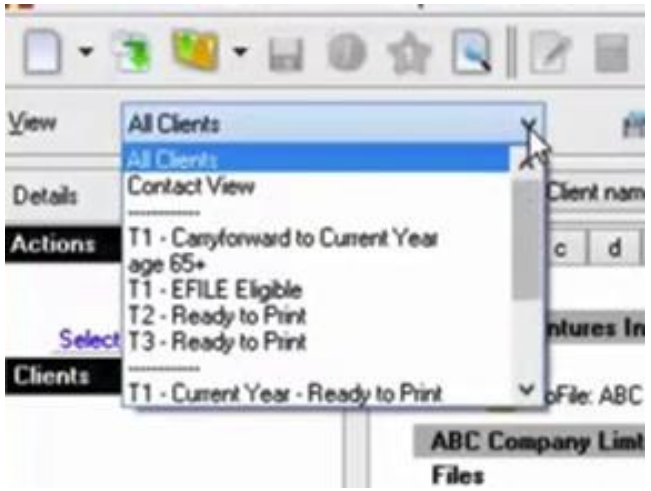
3. Select the **Print Forms in File…** option from the **Database** drop-down menu.

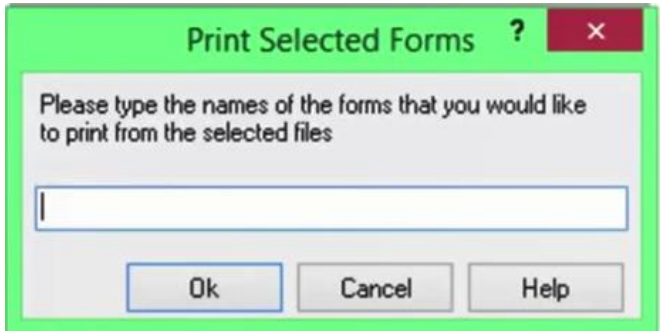
The **Print Selected Forms** window displays.

4. Enter the name of the form to print (for example, **t2038**).

**Note:** To print several forms, enter them all with a semicolon as a divider between each form (for example, **t2038; t2036**).

5. Click the **OK** button; the forms print.





Print Selected Forms
Please type the names of the forms that you would like to print from the selected files
Ok
Cancel
Help

Print Selected Forms
Please type the names of the forms that you would like to print from the selected files
t2038;t2036
Ok
Cancel
Help

# Using Queries in Client Explorer

**Note:** A query applies only to returns of a single type (for example, 2019 T1 returns). The Client Explorer's query function allows preparers to produce a list of files with specific values for batch printing or to include on a report. Queries can also select data to export or to select files that require mailing labels.

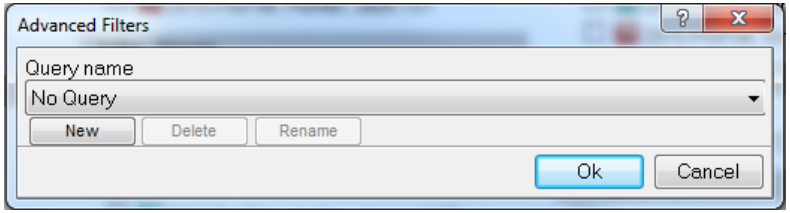
The query function filters the client list to compare fields and display the matching client files. A query can be applied for any field in the client file, including client city, debt level, return status, or age.

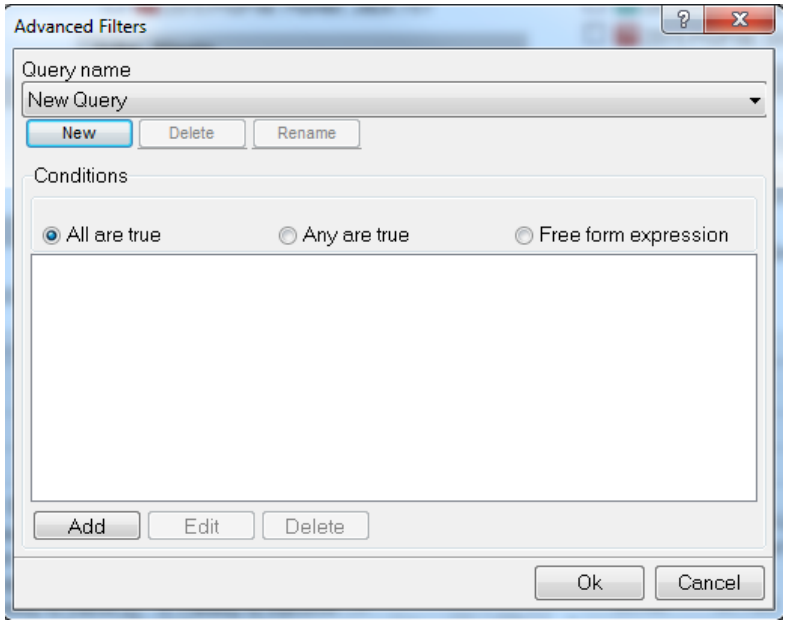
**Query example:**

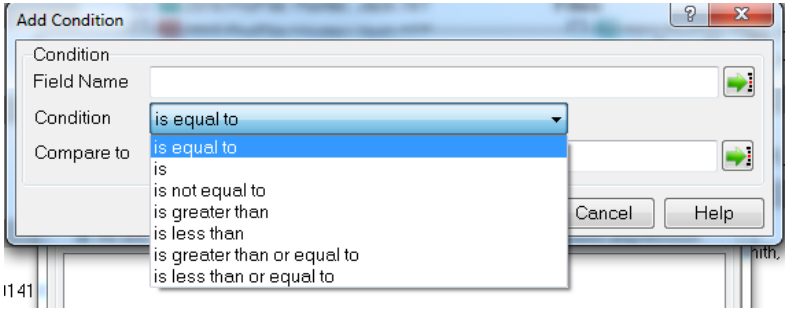
A preparer wishes to select all clients who have birth dates prior to January 1, 1934, but later than December 31, 1932: these are the clients who turned age 69 during 2002.

**Running a query:**

1. Set **Client Explorer** as the database option in ProFile.
2. Open **Client Explorer** in ProFile; a list of clients displays.
3. Click the **Filter** button; a list of options displays.
4. Select the module to be queried (for example, **T1**) and tax year to be queried (for example, **2019**).
5. Click the **Advanced** button; the **Advanced Filters** window displays.
6. Click the **New** button; the **Advanced Filters** window expands to display the Add button and three Conditions for queries.
7. Click the **Add** button; the **Add Condition** window displays.



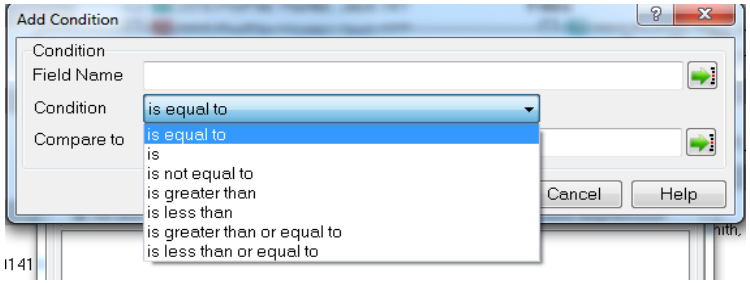



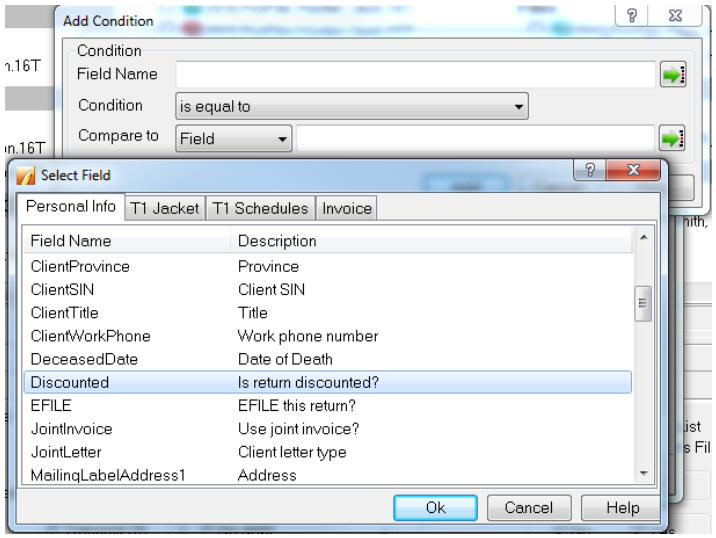
# Using Queries in Client Explorer, Continued

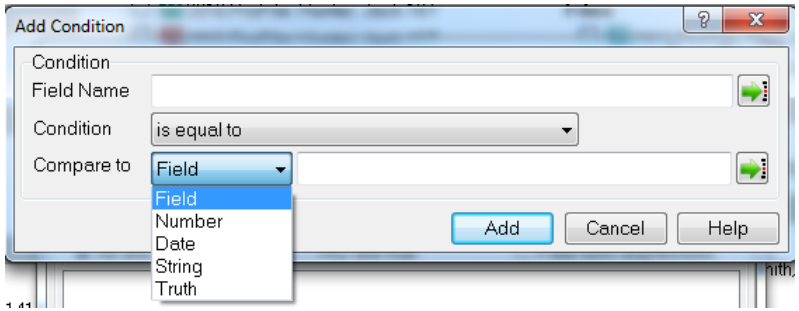
**Setting conditions for queries**

In this instance, we will be querying client invoices for amounts no greater than $10,000.

1. Click the drop-down menu in the **Condition** field of the **Add Condition** window; a list of conditions displays.
2. Select the condition necessary for the query. For example, you may be seeking value "not greater than" the amount of $10,000. If this condition is selected, no amount greater than $10,000 displays in the query results.
3. Click the drop-down menu in the **Compare to** field of the **Add Condition** window; a list of conditions displays.
4. Set the condition necessary for the query. For example, if you are querying invoices for billings of less than $10,000, select the appropriate invoice field to query.
5. If this query will be used again at a later time, enter the query name in the **Field Name** field (for example, **Invoices less than 10K**).
6. Click the **Add** button; the newly created query saves in the query list.
7. In the Client Explorer, click the **Apply Filters** button. The query runs and displays results.



# Using Intuit's Hub and Link

# Overview of ProFile Hub

Hub is a document management dashboard that helps you access customer information quickly and seamlessly so you may process returns more efficiently.

Within Hub, you can access client contact information, check the status of a return and review any notes that may have been added.

Within Hub, you have access to document management sources, such as Link, to help you gather information from your clients in one secure place. Hub will be your one-stop shop for all of your data sources and much more.

**What modules does Hub support?**

Hub supports T1 and T2 modules.

**Does Hub support Auto-fill my Return (AFR)?**

Yes.

**How does Hub work with Inuit Link?**

Hub works effortlessly with Link, a user-friendly online portal that helps you collaborate more effectively with your clients to gather their information for tax season.

Through Link, you can seamlessly create and send personalized requests to clients to request documents and information. You can also leverage templates already created within Link or create specific requests based on previous year's returns.

You are also able to send reminders within Link if you would like to follow-up on outstanding items.

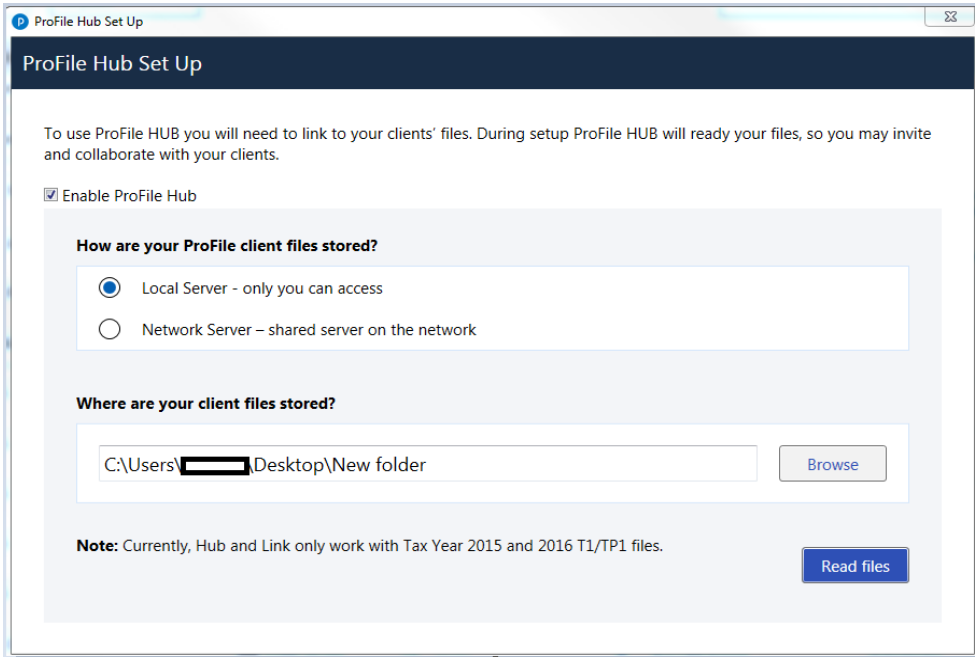
Together, Intuit Hub and Link streamline document management in ProFile.

**How much do Hub and Link cost?**

Hub and Link are complimentary with 2016 ProFile and onwards. Customers need to have purchased a ProFile T1 or T2 module.

# Initial Setup of Hub

**Note:** Preparers should download the latest version of ProFile before undergoing the Hub setup process.

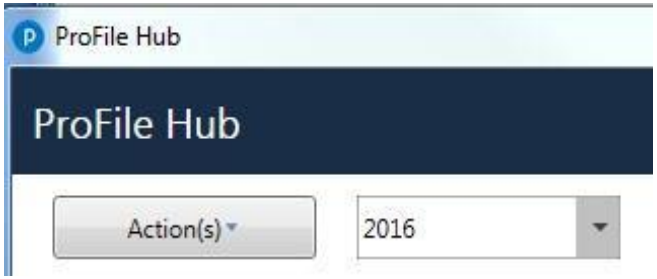

ProFile Hub Set Up
ProFile Hub Set Up
To use ProFile HUB you will need to link to your clients' files. During setup ProFile HUB will ready your files, so you may invite and collaborate with your clients.
Enable ProFile Hub
How are your ProFile client files stored?
Local Server - only you can access
Network Server – shared server on the network
Where are your client files stored?
C:\Users\[redacted]\Desktop\New folder
Browse
Note: Currently, Hub and Link only work with Tax Year 2015 and 2016 T1/TP1 files.
Read files

**Setting up Hub:**

1. Open the ProFile application.
2. Select the **Hub** option from the **Goto** drop-down menu in the top toolbar.

The **ProFile Hub Set Up** window displays.

3. Select the **Enable ProFile Hub** check box.
4. The options menu for Hub set up becomes active.
5. Select an option from the **How are your ProFile client files stored?** section; preparers select **Local Server** or **Network Server** for file storage.
6. Click the **Browse** button in the **Where are your client files stored?** section.
7. Select the location where client files are stored; this allows Hub to access client information.
8. Click the **Read files** button.



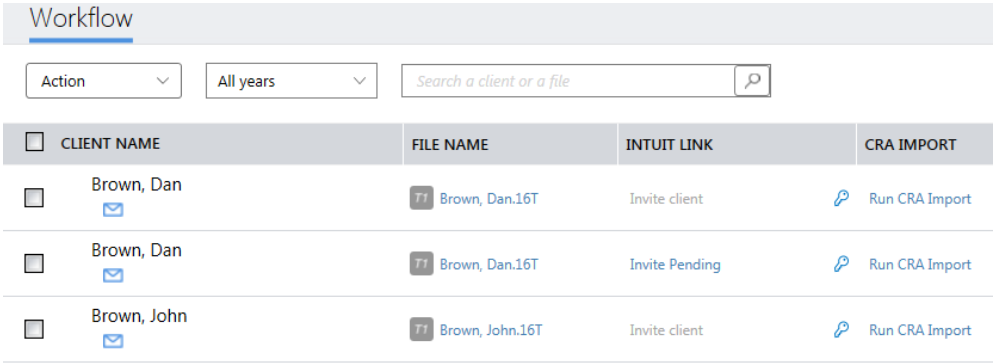

The Hub interface populates with returns; these files originate from the location selected in the **Where are your client files stored?** section.

9. Select the applicable tax year from the drop-down menu to filter imported returns.

The list of client returns displays.

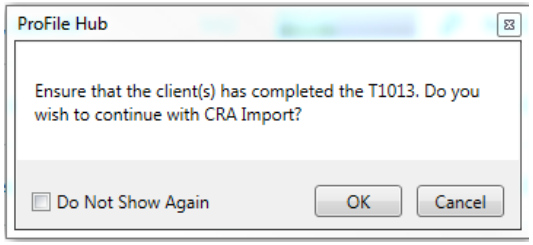
# Import Data via Auto-Fill my Return (AFR) in Hub

**Note:** A completed **T1 Authorize a representative submission** is required before a preparer can import data to Hub via AFR.




**Importing Data in Hub:**

1. Open ProFile.
2. Select the **Hub** option from the **Goto** drop-down menu in the top toolbar.
3. Hub opens, displaying the list of clients. Add a new client if required.
4. Identify the client to undergo data import.
5. Click the **Run CRA Import** link in the **CRA IMPORT** column.

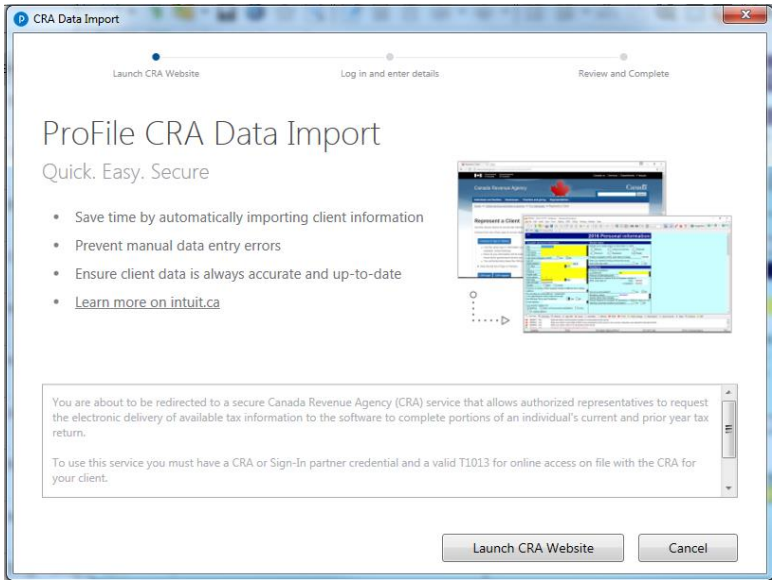

ProFile Hub
Ensure that the client(s) has completed the T1013. Do you wish to continue with CRA Import?
Do Not Show Again
OK
Cancel

A prompt displays inquiring to the completion of a **T1 Authorize a representative.**

6. Click the **OK** button to proceed.

The ProFile **CRA Data Import** window displays.

7. Complete the prompts; the data import process in Hub is identical to that in ProFile from this point onwards.


CRA Data Import
Launch CRA Website
Log in and enter details
Review and Complete
ProFile CRA Data Import
Quick. Easy. Secure
Save time by automatically importing client information
Prevent manual data entry errors
Ensure client data is always accurate and up-to-date
Learn more on intuit.ca
You are about to be redirected to a secure Canada Revenue Agency (CRA) service that allows authorized representatives to request the electronic delivery of available tax information to the software to complete portions of an individual's current and prior year tax return.
To use this service you must have a CRA or Sign-In partner credential and a valid T1013 for online access on file with the CRA for your client.
Launch CRA Website
Cancel

# Using Filters in Hub

Hub allows preparers to filter the tax year of returns in the client list. Preparers can view returns from specific years or from all years.

**Setting filters in Hub:**

1. Open ProFile.
2. Select the **Hub** option from the **Goto** drop-down menu in the top toolbar.

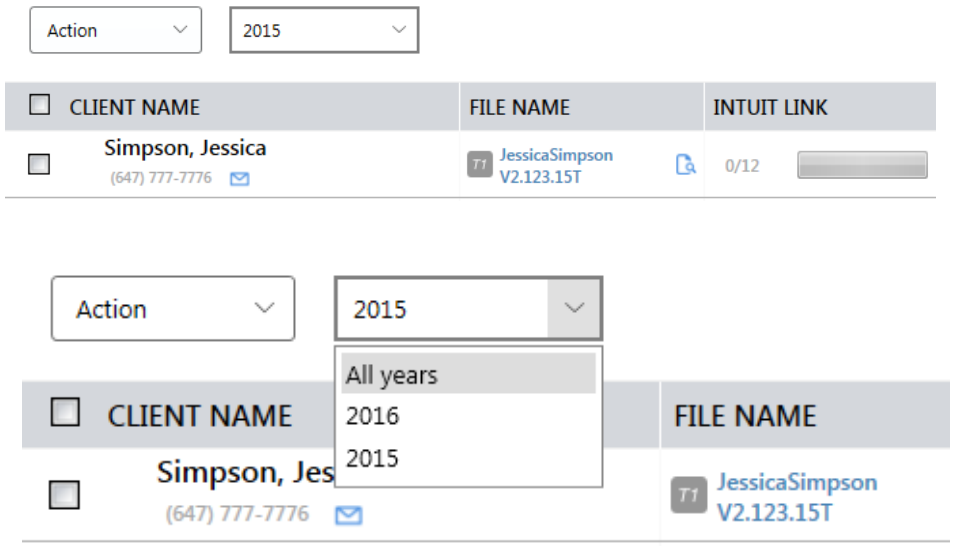
Hub opens, displaying a list of clients.

3. The filter drop-down menu displays at the top of the client list.
4. Select the drop-down menu; a list of available tax years displays.

The **All year**s designation also displays.

5. Select the applicable option to filter.

The filtered results display in the client list.

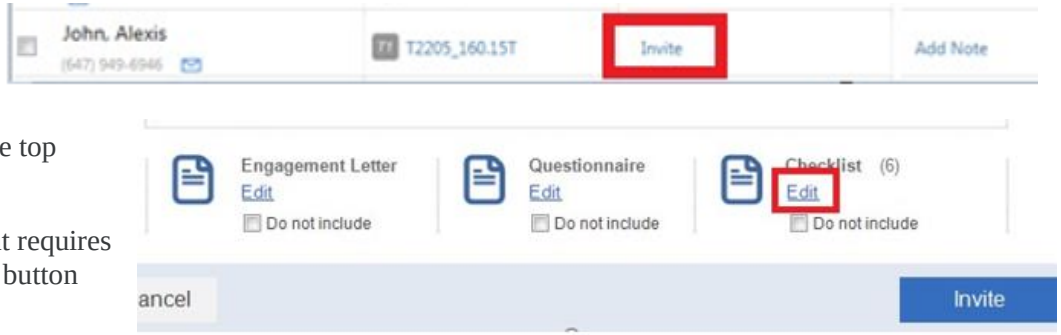


# Using Checklists in Hub

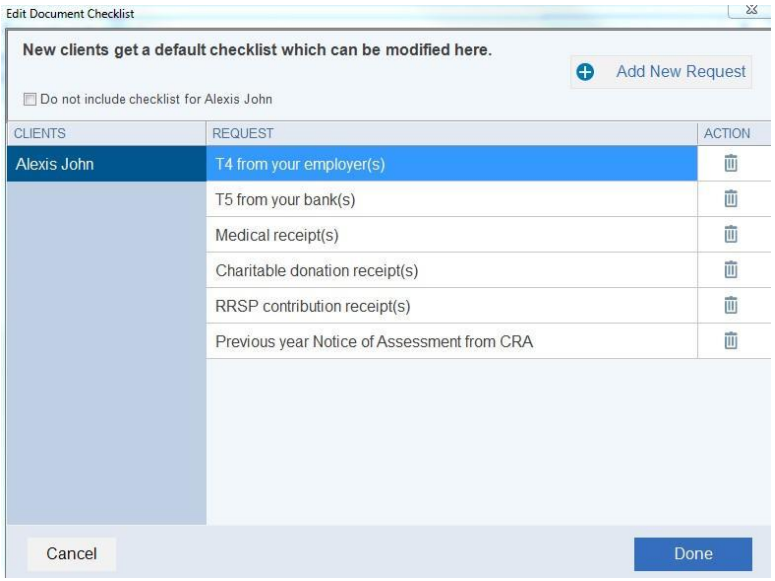
Hub allows users to maintain a checklist of tasks and/or requests assigned to a client. This list generates automatically based on the client's prior-year return that can be added to or changed as needed.

**Reviewing a checklist:**

1. Open ProFile.
2. Select the **Hub** option from the **Goto** drop-down menu in the top toolbar.
3. Hub opens, displaying a list of clients. Identify the client that requires a checklist for (for example, **Brown, Dan**). Click the **Invite** button associated with the client.
4. The **Invite Clients to Use Link** window opens. Select the **Edit** link from the **Checklist** option.




The **Edit Document Checklist** window displays.




The checklist details the client, the individual requests made to the client (based on the previous year's requests) and the action that can be undertaken.

# Using Checklists in Hub, Continued

**Deleting an existing checklist entry:**

1. Identify the checklist entry to be deleted.
2. Click on the **trash can icon** next to the checklist entry under the **ACTION** menu; the entry deletes.

**Note:** Hub users will not see a confirmation window; the checklist entry deletes immediately.

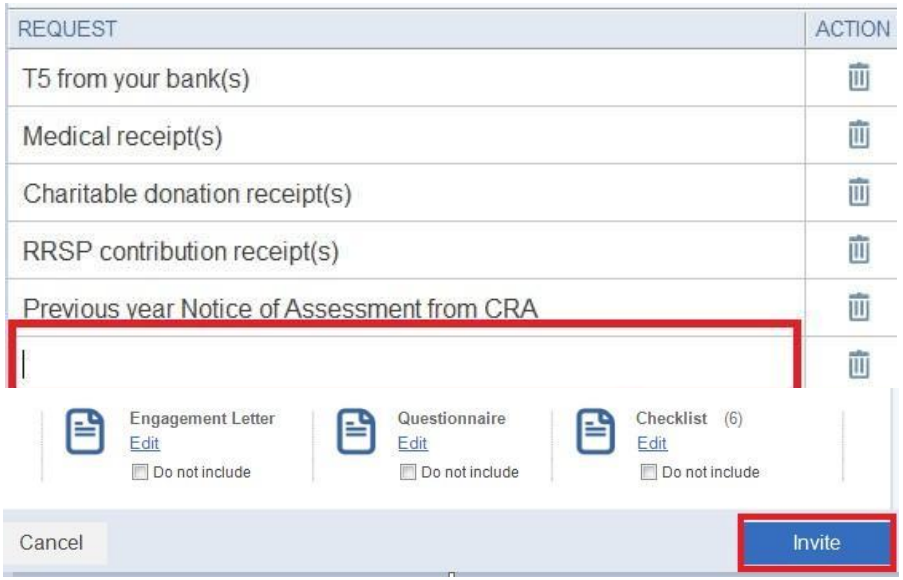
3. Click the **Done** button. The checklist updates and the **Edit Document Checklist** window closes.
4. Click the **Invite** button in the **Invite Clients to Use Link** window.

The invitation with the checklist is sent to the client.

**Adding a new checklist entry:**

1. Click the **Add New Request** button in the **Edit Document Checklist** window.

A new blank checklist entry field is created.




2. Enter the new checklist entry (for example, **Travel receipts**).
3. Click the **Done** button. The checklist updates and the **Edit Document Checklist** window closes.
4. Click the **Invite** button in the **Invite Clients to Use Link** window.

The invitation with the checklist is sent to the client.

# Using Questionnaires in Hub

The questionnaire template in Hub allows users to compile and send questions via email for clients to answer.

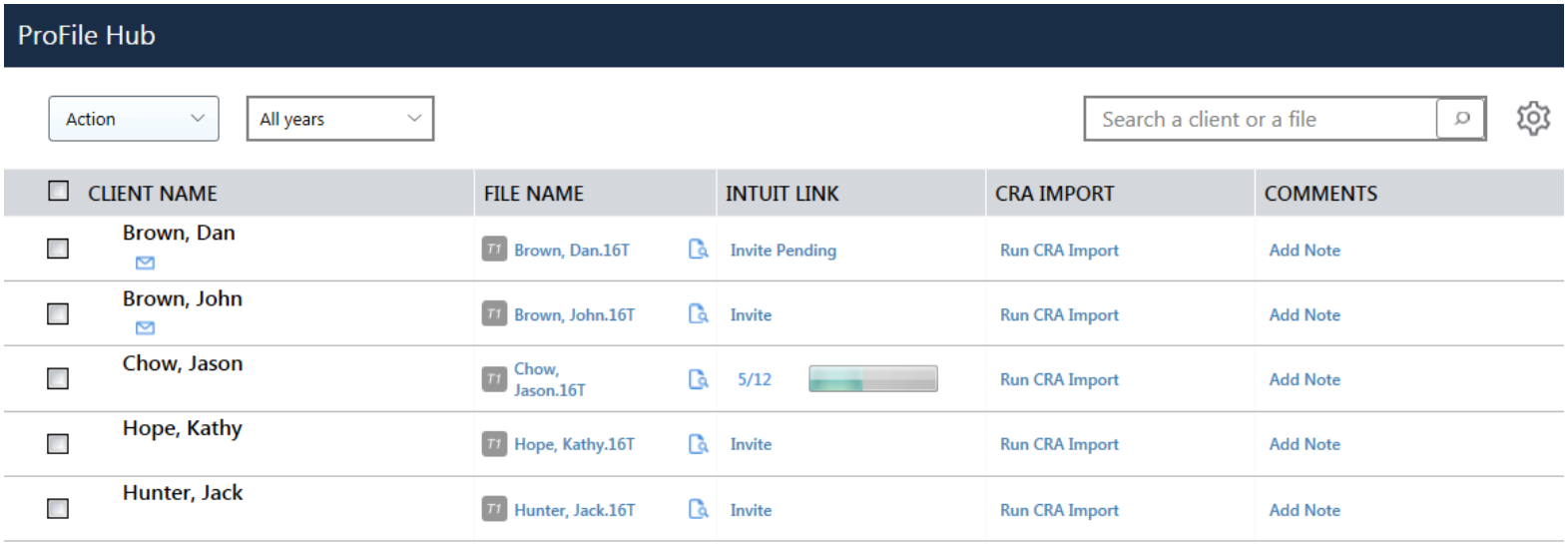
Questionnaire templates are customizable to the type of clients, their location, or any other need. Response types can include either “Yes/No” or “Open-ended” responses.

**Opening a questionnaire template:**

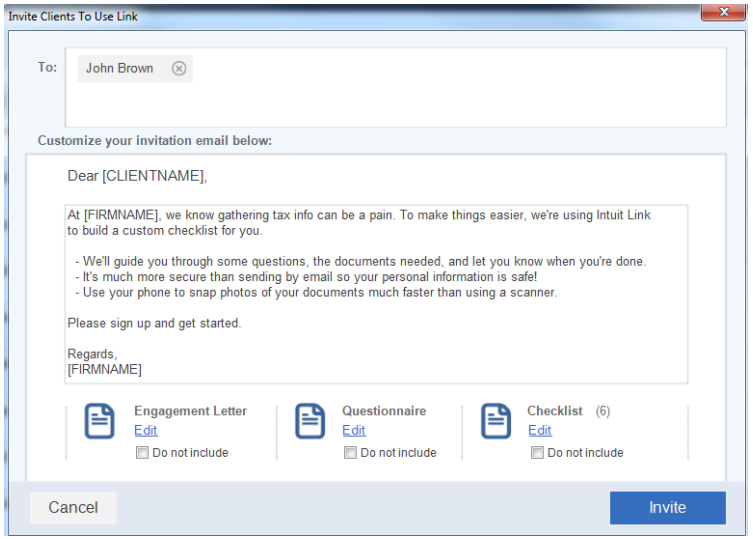
1. Open ProFile.
2. Select the **Hub** option from the **Goto** drop-down menu in the top toolbar.

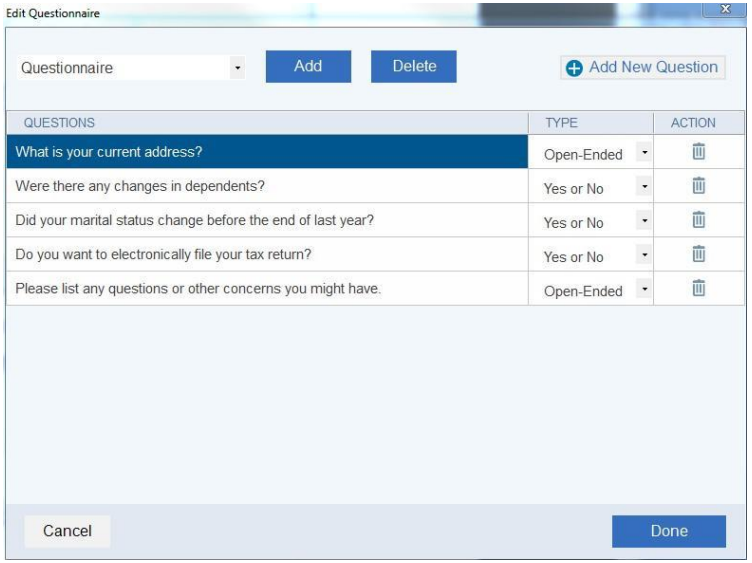
Hub opens, displaying a list of clients.

3. Identify the client to whom you want to send an engagement letter (for example, **Brown, John**).
4. Click the **Invite** button associated with the client.



# Using Questionnaires in Hub, Continued


Invite Clients To Use Link
To:
John Brown
Customize your invitation email below:
Dear [CLIENTNAME],
At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you.
- We'll guide you through some questions, the documents needed, and let you know when you're done.
- It's much more secure than sending by email so your personal information is safe!
- Use your phone to snap photos of your documents much faster than using a scanner.
Please sign up and get started.
Regards,
[FIRMNAME]
Engagement Letter
Edit
Do not include
Questionnaire
Edit
Do not include
Checklist (6)
Edit
Do not include
Cancel
Invite




The **Invite Clients to Use Link** window opens.

5. Select the **Edit** link from the **Engagement Letter** option.

The **Edit Questionnaire** window displays.

6. Users can undertake the following actions:

    - Edit the existing questions
    - Remove an existing question
    - Create new questions
    - Assign an answer type
    - Delete a question
    - Create a new questionnaire template

The questionnaire is sent to the selected client and responses are tracked under their entry in Hub.

**Related Articles**

Review the support articles related to Hub.

# Using Engagement Letters in Hub

Engagement letters allow a preparer to communicate with clients via letters that are personalized and reusable to reduce time and effort.

There are two options for personalizing an engagement letter in Hub:

- Use an existing engagement letter from a template
- Create a new engagement letter

**Using an existing engagement Letter:**

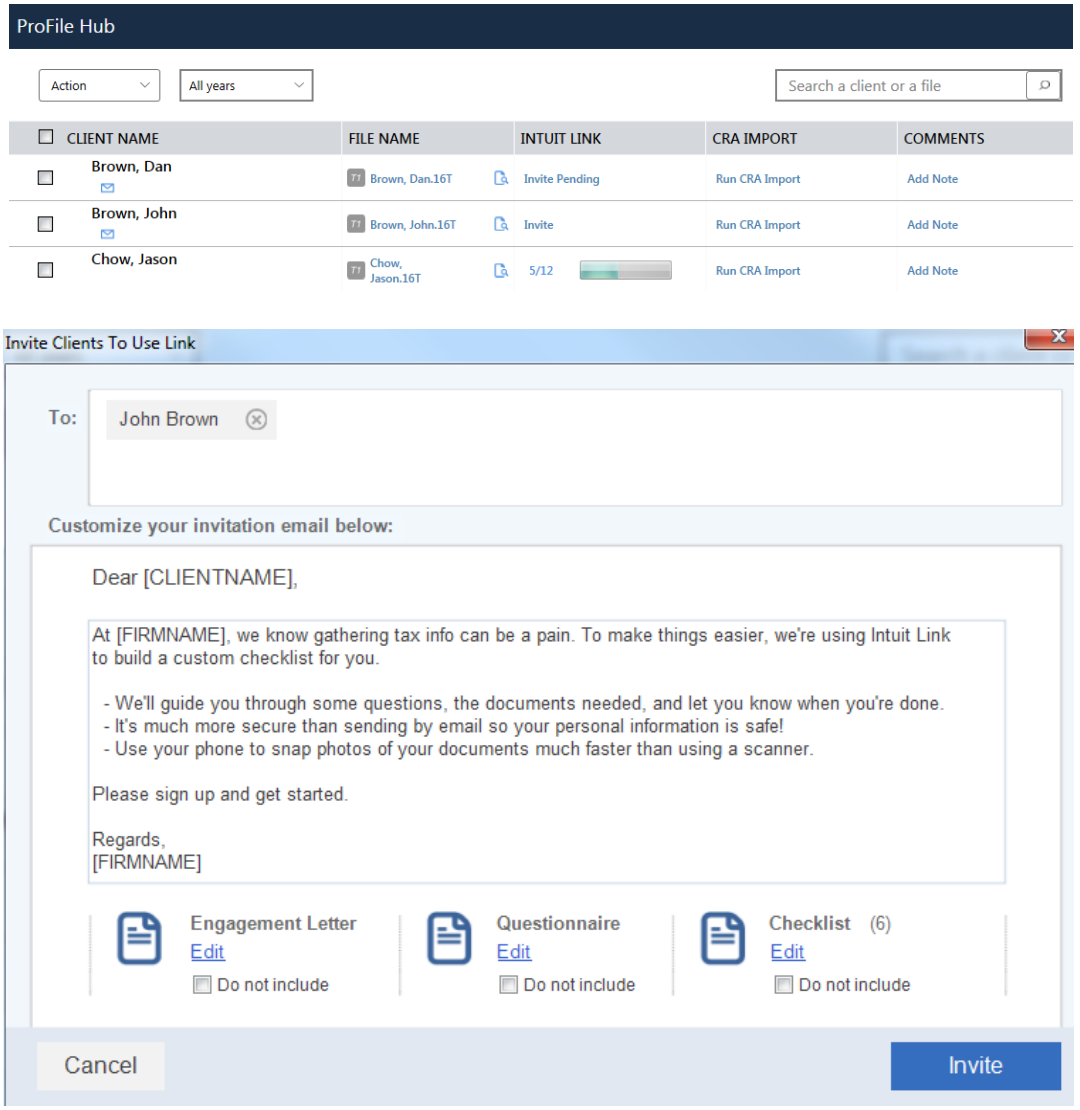
1. Open ProFile.
2. Select the **Hub** option from the **Goto** drop-down menu in the top toolbar.

Hub opens, displaying a list of clients.

3. Identify the client to whom you want to send an engagement letter (for example, **Brown, John**).
4. Click the **Invite** button associated with the client.

The **Invite Clients to Use Link** window opens.

5. Select the **Edit** link from the **Engagement Letter** option.



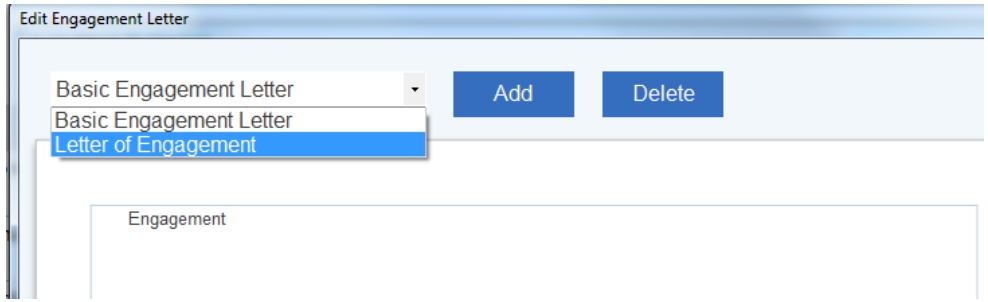
# Using Engagement Letters in Hub, Continued

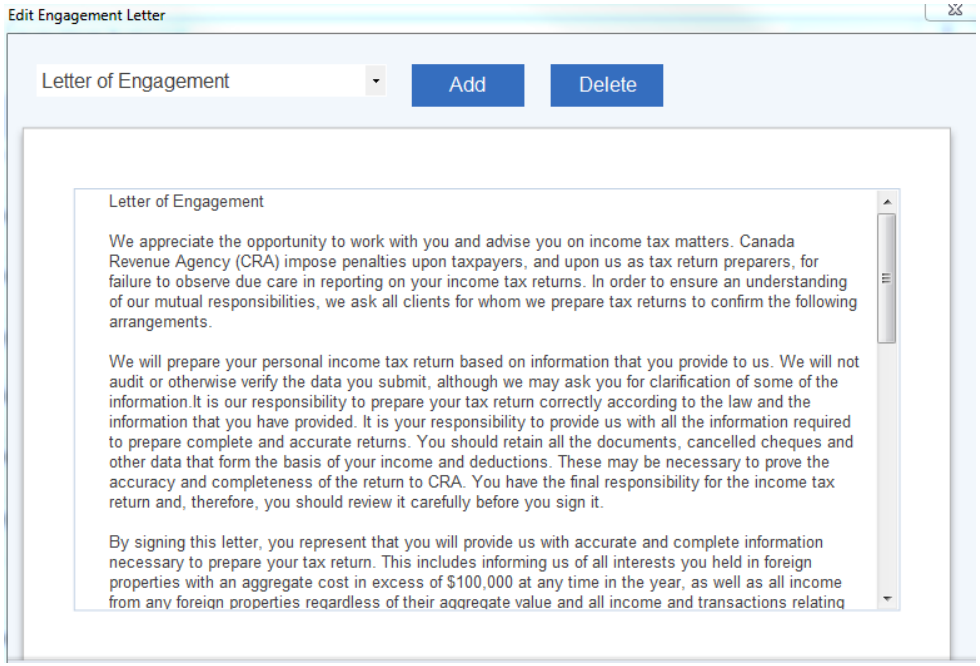
The **Edit Engagement Letter** window opens.

6. Click the drop-down menu at the top of the window; a list of existing letter templates displays.
7. Select the template to be edited and sent to the client (for example, **Letter of Engagement**).

The template-editing window displays.

8. Make any edits in the template-editing window.
9. Click the **Add** button above the editing window to save any changes.
10. Click the **Done** button; the engagement letter saves.
11. Click the **Invite** button in the **Invite Clients to Use Link**; the engagement letter is sent to the client.





Edit Engagement Letter
Letter of Engagement
Add
Delete
Letter of Engagement
We appreciate the opportunity to work with you and advise you on income tax matters. Canada Revenue Agency (CRA) impose penalties upon taxpayers, and upon us as tax return preparers, for failure to observe due care in reporting on your income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements.
We will prepare your personal income tax return based on information that you provide to us. We will not audit or otherwise verify the data you submit, although we may ask you for clarification of some of the information.It is our responsibility to prepare your tax return correctly according to the law and the information that you have provided. It is your responsibility to provide us with all the information required to prepare complete and accurate returns. You should retain all the documents, cancelled cheques and other data that form the basis of your income and deductions. These may be necessary to prove the accuracy and completeness of the return to CRA. You have the final responsibility for the income tax return and, therefore, you should review it carefully before you sign it.
By signing this letter, you represent that you will provide us with accurate and complete information necessary to prepare your tax return. This includes informing us of all interests you held in foreign properties with an aggregate cost in excess of $100,000 at any time in the year, as well as all income from any foreign properties regardless of their aggregate value and all income and transactions relating

# Using Engagement Letters in Hub, Continued

**Adding a new engagement letter:**

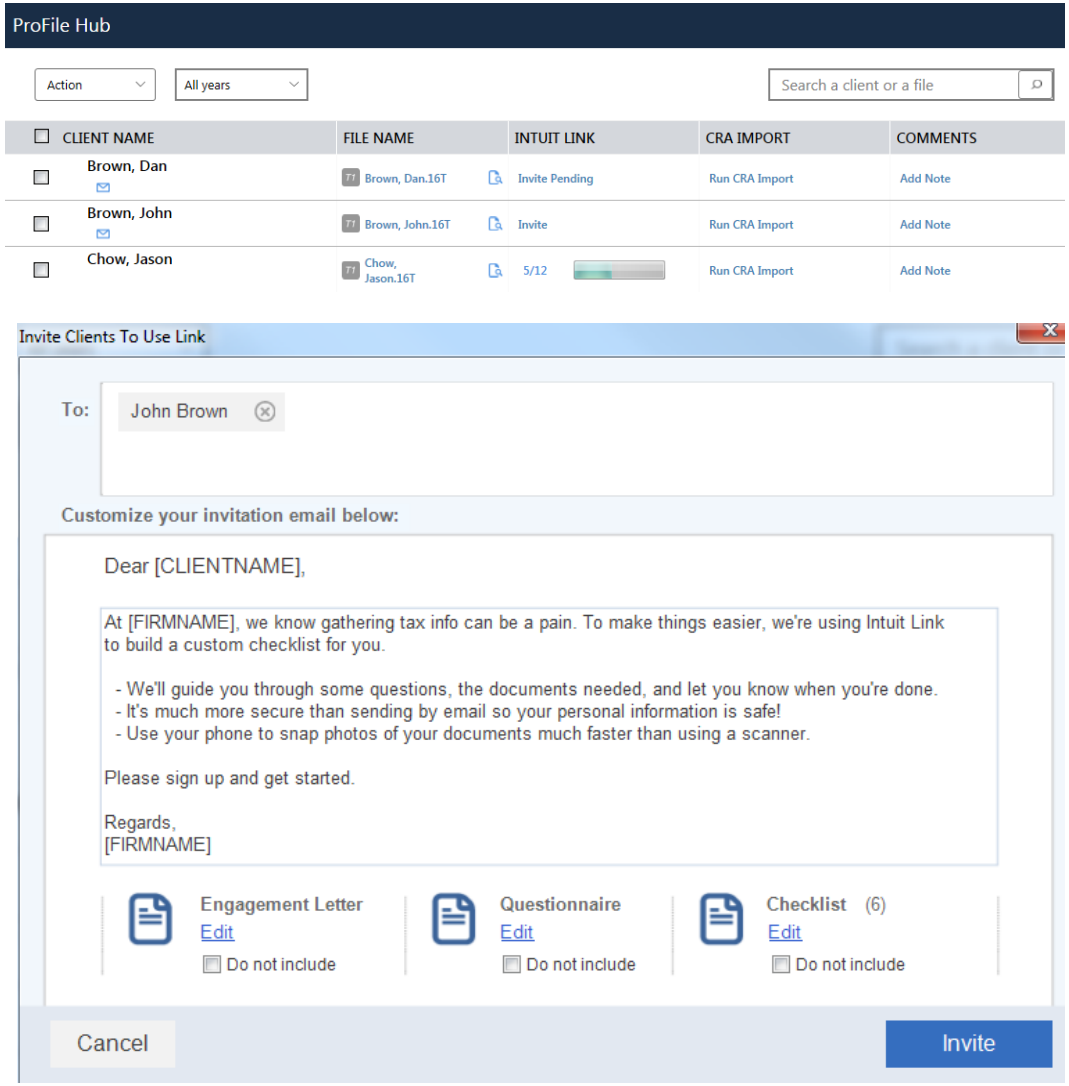
1. Open ProFile.
2. Select the **Hub** option from the **Goto** drop-down menu in the top toolbar.

Hub opens, displaying a list of clients.

3. Identify the client to whom you want to send an engagement letter (for example, **Brown, John**).
4. Click the **Invite** button associated with the client.

The **Invite Clients to Use Link** window opens.

5. Select the **Edit** link from the **Engagement Letter** option.



# Using Engagement Letters in Hub, Continued

The Edit Engagement Letter editing window displays.

6. Click the **ADD** button above the letter content.

The **New Engagement Letter** window displays.

7. Enter the name of the new template in the field (for example, **Receipt Request Letter**).

8. Click the **OK** button.

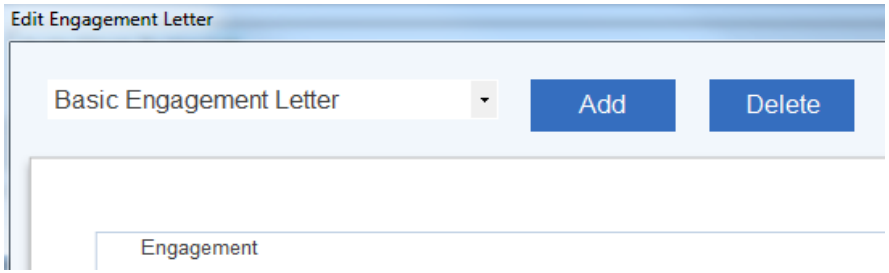
The new letter is added to the drop-down list of available engagement letter templates.

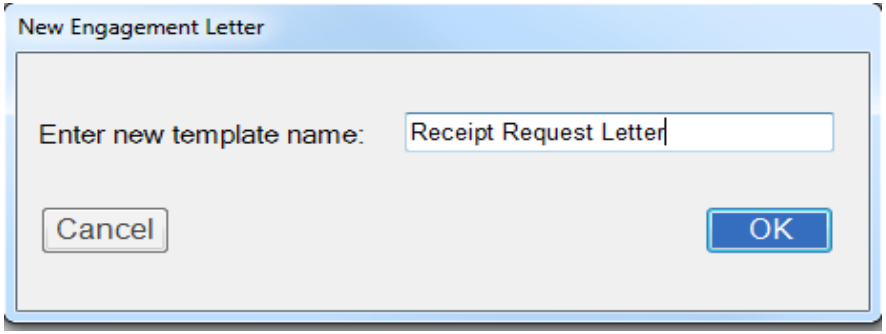
9. Add the necessary content and information to the new engagement letter.

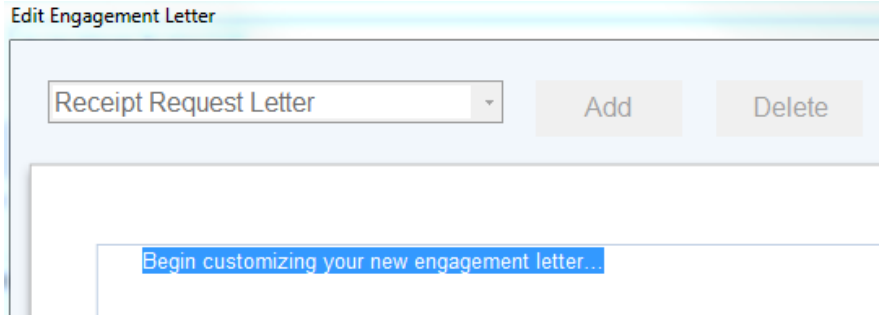
10. Click the **Done** button; the template saves.

The new letter is available under the drop-down menu when creating future engagement letters.

11. Click the **Invite** button in the **Invite Clients to Use Link**; the new engagement letter is sent to the client.



# Overview of ProFile Link

**Intuit Link** is a secure, web-based portal that accountants use to gather tax data and responses from their clients.

**What are the benefits of Link?**

Link provides several benefits to a preparer's clients, including but not limited to:

- Clarity on what a preparer needs to prepare a client's tax return(s)
- Flexibility to collect and share tax data year-round from any device
- Convenience of providing preparers with materials via pictures taken with a mobile device or from a financial institution
- Ability to keep track of what material has been submitted or is still outstanding
- Bank-level encryption to protect client data

**How much does Link Cost?**

Link is complimentary with 2016 ProFile and later years. Customers need to have purchased a ProFile T1 or T2 module.

**How do I review documents my client has provided?**

You can check the responses from clients in **Hub**; the details of their responses display in Link.

# Accountant View in Link

The Accountant view in Link displays the majority of information that a preparer needs to manage client invitations and acceptances.

**Tax year selection:** Filter the client list by the appropriate tax year.

**Clients:** Displays clients that have been added to Link.

**Firm Settings:** Details the firm information, notification settings, and template options.

**New Features:** Details new Link features as they become available.

**Learning Library:** Opens an external link to the Link Learning Library.

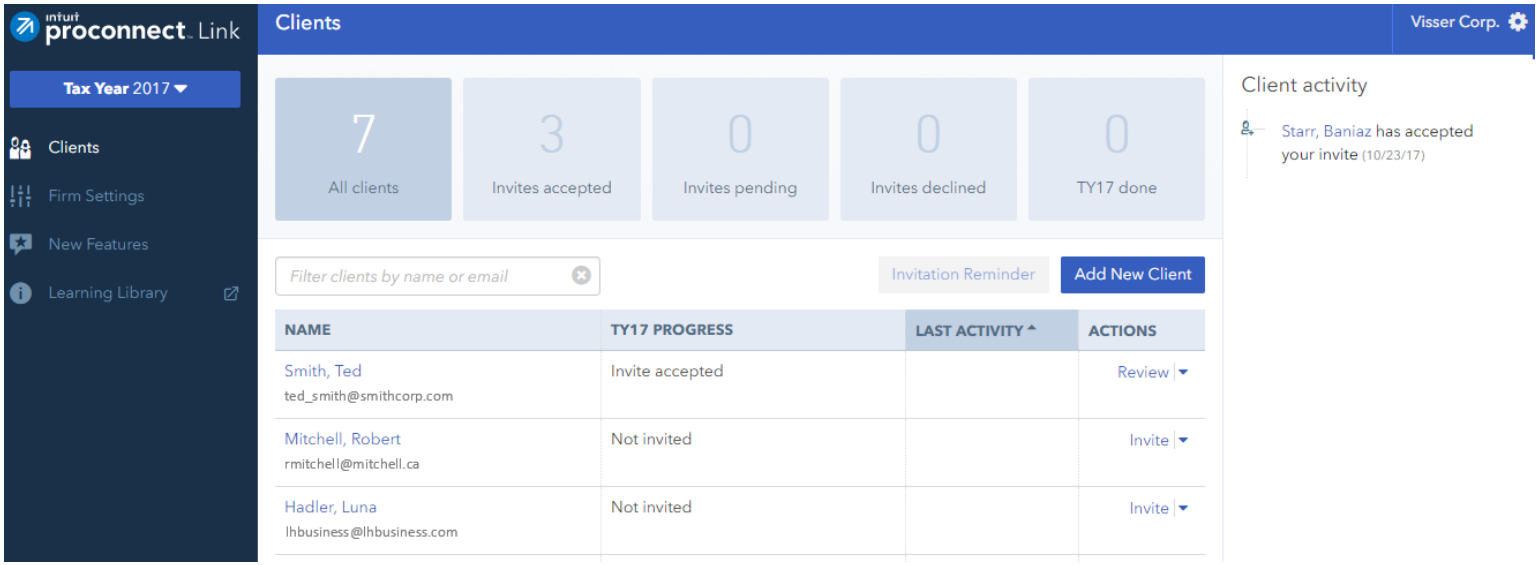
**Invitation status:** Details status of invitations, including those accepted, pending, declined, and done.

**Client details:** Lists the name, progress, activity, and actions for each client in Link.

**Client activity:** Details recent client activity, such as acceptance of invitations or completed tasks.

**Invitation Reminder:** Sends clients a reminder that a previous invitation is still pending.

**Add New Client**: Adds a new client to the client list.



# Adding a Client to Link's Accountant View

Preparers can add clients into the Accountant view in Link to help track communications and progress in delivering materials (receipts, forms, etc.)

**Navigating to Hub:**

1. Open ProFile.
2. Select the **Hub** option from the **Goto** drop-down menu in the top toolbar.
3. Sign in to Hub using your One Intuit username and password.

A list of clients in Hub displays.

4. Select the appropriate module (for example, **T1 Module**) from the drop-down menu in the top left corner of Hub.

The list of Hub clients filters.

**For T1 clients:**

1. Create a new **T1 Individual** client return in ProFile.
2. Navigate to the Hub application; the client named in the newly created T1 displays.
3. Click the **Invite** link under the **Intuit Link** column for the new client.

The new client information exports from ProFile and displays in **Link**.

# Adding a Client to Link's Accountant's View, Continued

**For non-T1 clients:**

**Note:** ProFile displays the Link status of clients invited from ProFile. Those created within Link as described below will NOT be connected to the desktop program in any way.

You can create the new client (Individual) in Link and the new client will flow back to your ProFile Online client list.

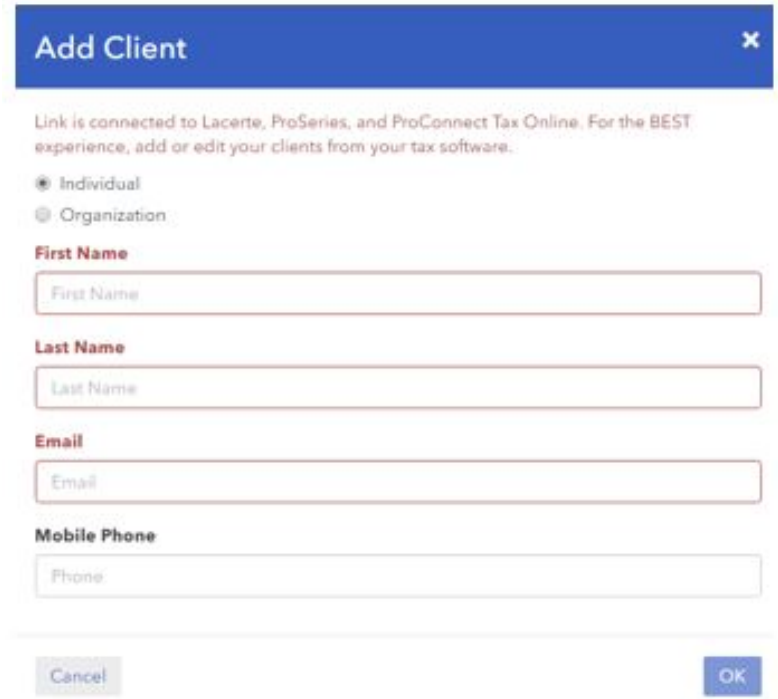
1. Navigate to the **Link** website:
2. Sign in using your One Intuit username and password.

Link opens; a list of clients who have accepted the invitation displays.

3. Click the **Add New Client** button from the right-side menu.

The **Add Client** window displays.

4. Indicate if the client is an **Individual** or **Organization**.
5. For an **Individual**, populate the **First Name**, **Last Name**, and **Email** fields. **Mobile Phone** is an optional field.
6. For an **Organization**, populate the **Organization Name** and **Email** fields. **Work Phone** is an optional field.
7. Click the **OK** button; the client is added to the client list.



# Sorting Client List in Link

Preparers can sort the client list in Intuit Link to display and identify clients of a particular status.

Categories for sorting include:

- NAME
- TYYY PROGRESS (for example, **TY19 PROGRESS**)
- LAST ACTIVITY

**Example: Sorting alphabetically by NAME**

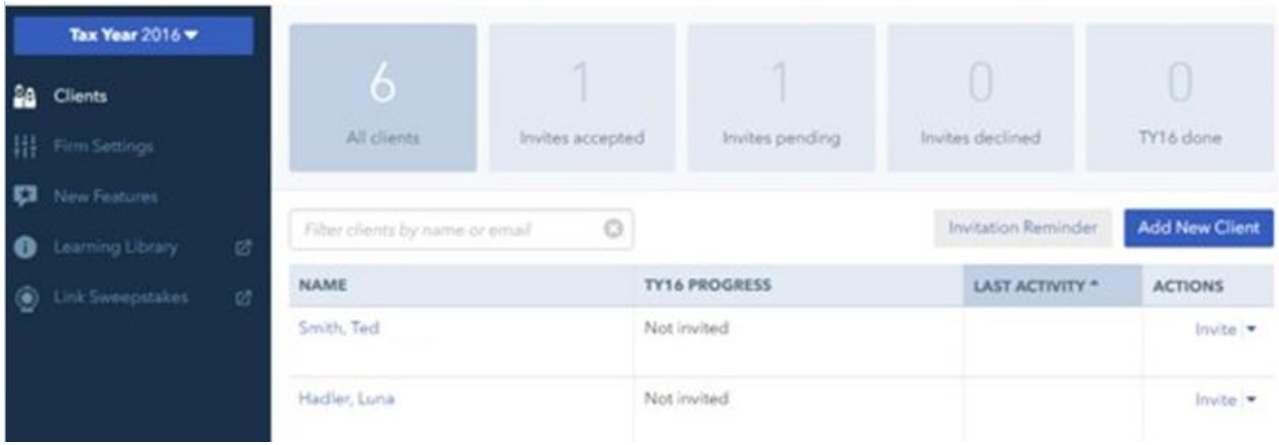
1. Log in to the Intuit Link site.
2. Select the **Clients** link on the left-side menu.

The list of clients displays.

3. Click the text within the column header (for example, **NAME**).

The sort order displays, listed alphabetically by the client's last name.

**Note:** Users must click on the text itself, not the space surrounding the text to sort the order list.



# Using Email Templates in Link

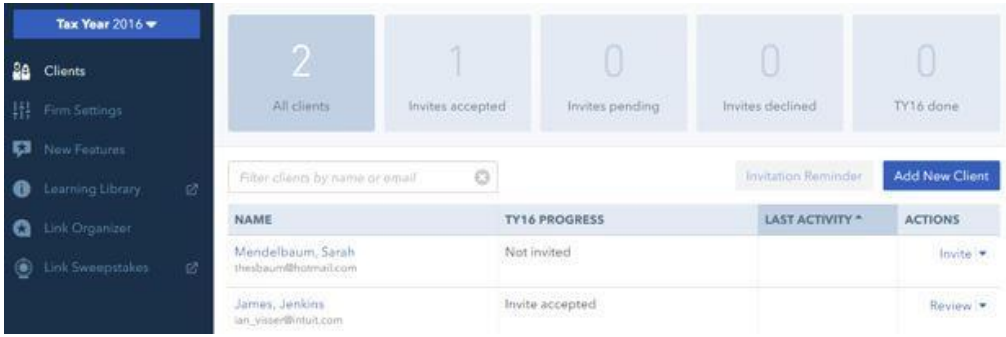
Intuit Link's custom email templates allow preparers to streamline communications with clients by creating unique email content that can be easily re-utilized, rather than having to copy-and-paste or rewrite emails from previous examples.

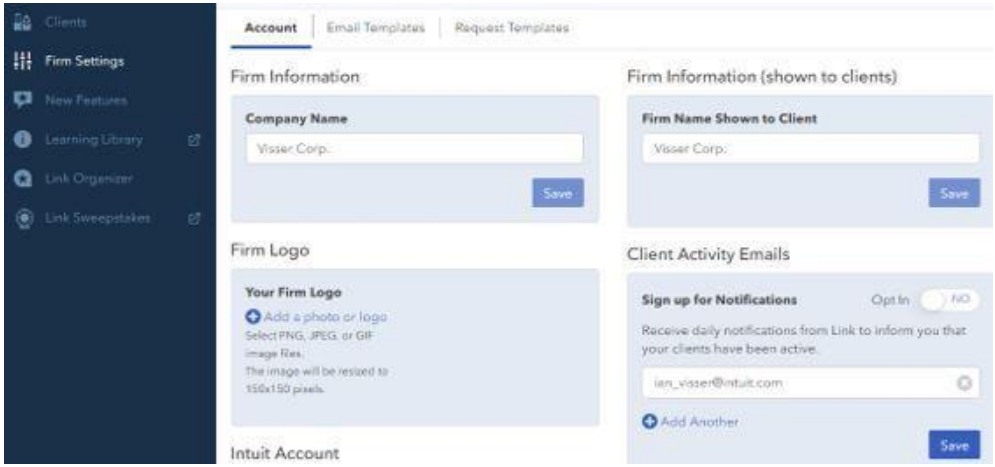
Email templates can include invite emails, reminder emails, and request emails.

**Creating custom Email templates**

1. Log in to the Intuit Link site.
2. Select the **Clients** link on the left-side menu; the client list displays.
3. Select the client.
4. Click the **Firm Settings** option from the left-side menu.

The **Firm Settings** display.

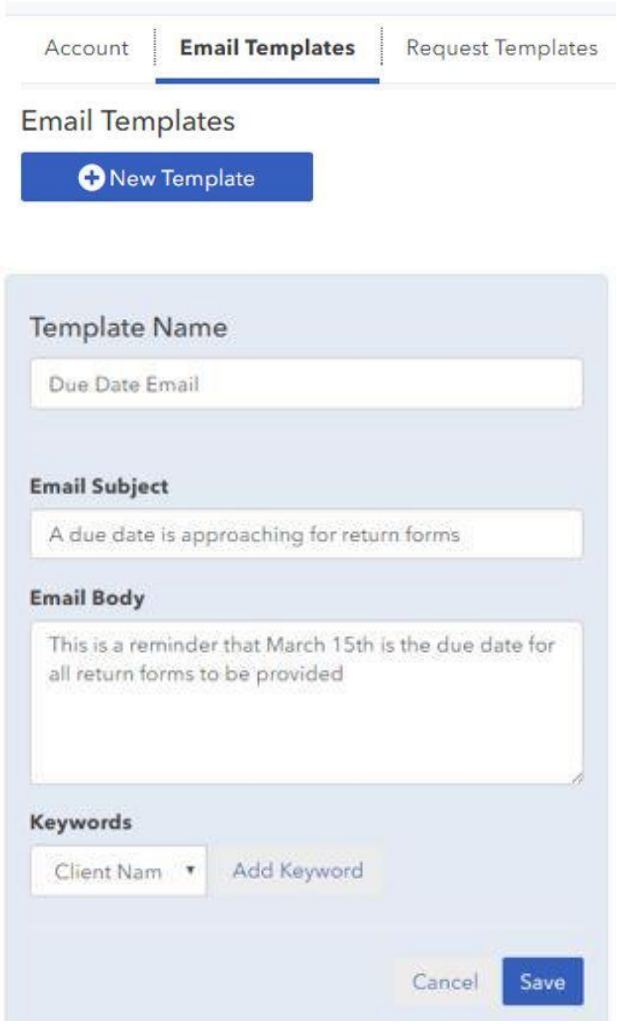


# Using Email Templates in Link, Continued

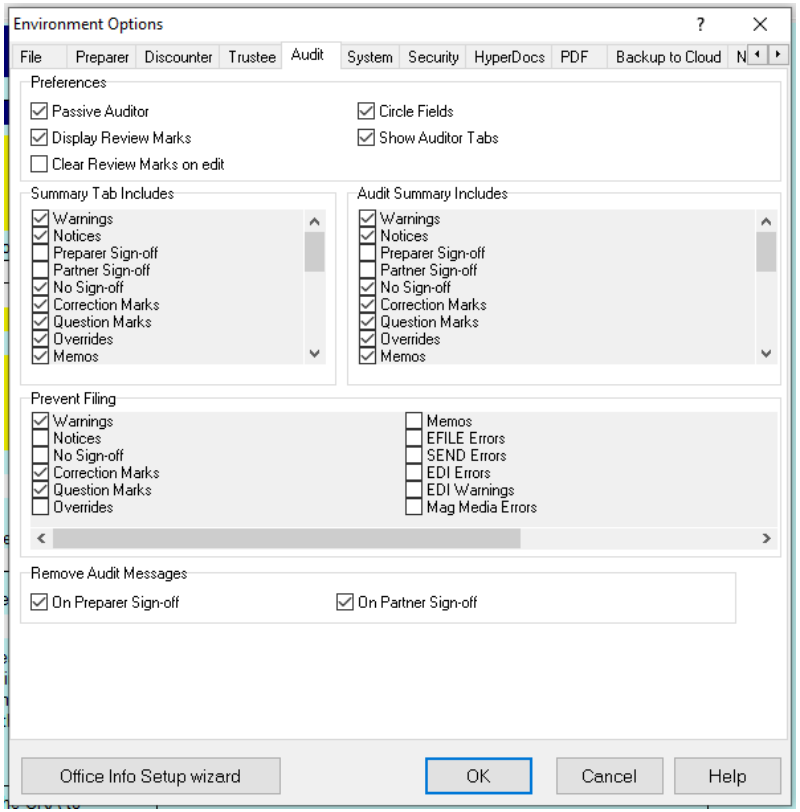
5. Click the **Email Templates** link in the menu bar.
6. Click the **New Template** button.
7. Complete the **New Template** fields:
    - **Template Name** gives the new template a name (for example, “Due Date Email”)
    - **Email Subject** gives the email a title that a client will see in their inbox (for example, “A due date is approaching for return forms”)
    - **Email Body** is the text that a client will see in their inbox (for example, “This is a reminder that March 15th is the due date for all return forms to be provided”)
8. Click the **Save** button.

The new email template displays under the **Email Templates** menu.



# Using the Active Auditor in ProFile

# Using the Active Auditor in ProFile




Profile's Active Auditor displays messages that relate to the data file. These include passive audit messages, notices, processing errors, overridden fields, fields that have memos attached, fields with review marks, and EFILE-related messages.

Error messages or errors that may restrict processing the return display in red text.

**Accessing the Active Auditor:**

The Active Auditor is accessed two ways:

- Select the **Active Auditor** icon in the top toolbar menu
- Right-click on any form and select the option **Show Auditor** from the menu

**Selecting Active Auditor options:**

**Note:** Setting the Active Auditor options in one location applies the settings for all modules Open ProFile.

1. Select **Environment…** from the **Options** drop-down menu in the top toolbar.
2. Select the **Audit** tab; the **audit options** window displays.

Each section of the audit options window has pre-set default selections.

**Note:** Modules may display different tabs in the Active Auditor based on the nature of the module itself, rather than settings.

**Preferences settings**

The Preferences section of the Audit tab includes settings that affect the display of warnings.

**Note:** ProFile recommends the Show Auditor Tabs option be selected to provide the clearest feedback and indication of errors on forms.

# Using the Active Auditor in ProFile, Continued

**Summary Tab Includes settings**

The Summary Tab Includes section of the Audit tab includes options that display in the auditor toolbar. Each of the selected options displays related errors in the corresponding Active Auditor tab.

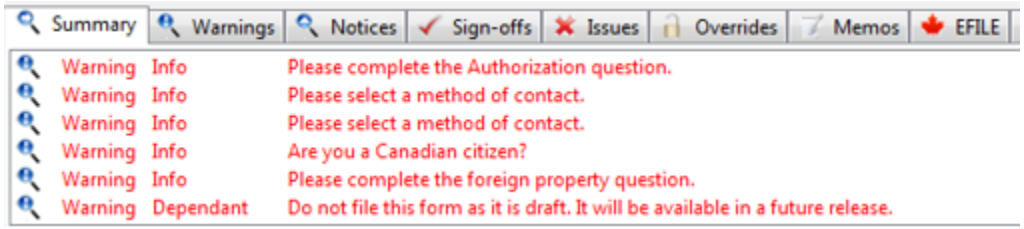
**Prevent Filing settings**

The Prevent Filing section of the Audit tab includes options that halt the filing of the form. Errors created by the violation of these options must be cleared before filing can take place.

**Remove Audit Messages settings**

The Remove Audit Messages section of the Audit tab includes options as to who can remove errors in the Active Auditor for a form.

**Note:** ProFile recommends one or both options be selected; otherwise error messages in the Active Auditor cannot be cleared to allow filing.

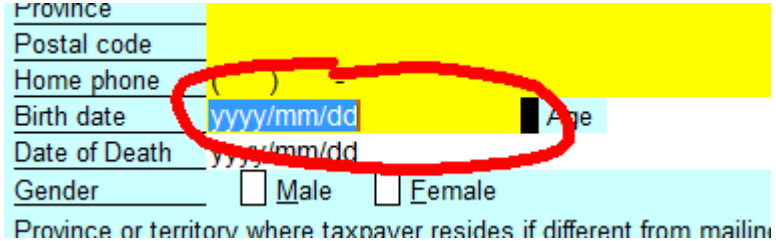

Summary
Warnings
Notices
Sign-offs
Issues
Overrides
Memos
EFILE
Warning Info Please complete the Authorization question.
Warning Info Please select a method of contact.
Warning Info Please select a method of contact.
Warning Info Are you a Canadian citizen?
Warning Info Please complete the foreign property question.
Warning Dependant Do not file this form as it is draft. It will be available in a future release.

**Clearing Active Auditor messages:**

Error messages display as red text in the Active Auditor tabs.

1. Double-click on an error warning in the tab.

The error circles in red on the form.




2. Resolve the error; the specific error in the tab details the issue.

In some cases, the error – as identified by ProFile – may actually be acceptable to the preparer and/or the client. For example, an RRSP amount may be acceptable but ProFile suggests the amount is outside the range expected by CRA and determines it to be an error.

In such cases the individual selected in the Remove Audit Messages section of the Audit tab can sign-off, or approve, the error.

# Using Review Marks in ProFile

Preparers assign review marks while undertaking returns in ProFile. Preparers use review marks to indicate if field contents are correct and verified or if the field requires further review or data from a client.

Review marks appear on the ProFile top toolbar menu as red icons: check marks, an X, and a question mark.

**Types of review marks**

There are **four types of review marks** available in ProFile:

- **Preparer sign-off:** The preparer of the return must provide sign-off
- **Partner sign-off:** The partner of the return must provide sign-off
- **Correction required:** The field requires a correction (amount, etc.)
- **Question:** The data provided in the field prompts a question or clarification

**Using review marks:**

1. Open the return that requires review marks.
2. Select the appropriate review mark from the top toolbar menu; the mouse pointer changes to an arrow with the corresponding mark attached.
3. Click on the appropriate field in the return to apply the review mark; the review mark appears over the black status box to the right of the field.
4. Save the return. The added review marks are retained in the return until addressed/removed by the preparer.

# Using Additional ProFile Features

# Using Intuitive Copy in ProFile

The copy and paste function allows preparers to save time when it is necessary to create a copy of a business statement already in use.

For example, a preparer may be completing business statements for non-spousal partners in a T1 return. When using copy and paste, it is not necessary to re-enter the same business data in both files.

**Using Form copy and paste:**

1. Open ProFile.
2. Complete the necessary statement in the client file.
3. Select the **Copy Form** option from the **Edit** drop-down menu in the top toolbar.
4. Open the data file for the partner.
5. Open a blank copy of the same statement in the partner's file.
6. Select the **Paste Form** option from the **Edit** drop-down menu in the top toolbar; the blank form populates.
7. Edit/complete the populated form for this client.

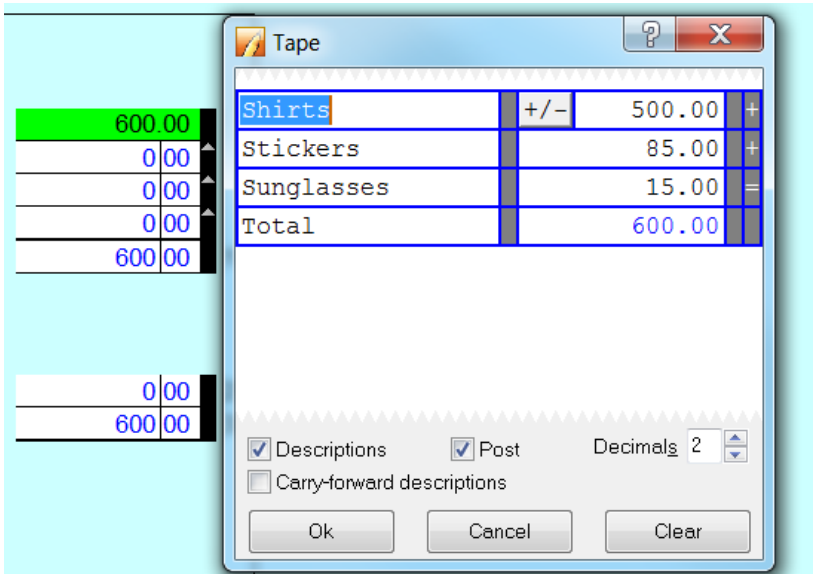
**Intuitive Copy and Paste:**

ProFile business statements include a section for partner details, including the name, social insurance number, and percentage of share in the partnership. Intuitive copy and paste allows this information to be copied quickly into each partner form.

1. Finalize all business statement data.
2. Select the **Intuitive copy** option from the **Edit** drop-down menu in the top toolbar; the statement's data copies.
3. Open the business statement in the partner's file.
4. Select the **Intuitive paste** option from the **Edit** drop-down menu in the top toolbar; the copied data pastes into the partner's statement.

ProFile automatically adjusts all amounts and partner details. Attached memos and tapes also copy to the partner's business statement.

# Attaching Tapes in ProFile




Using ProFile, preparers can attach tapes to fields. The Attach Tape feature functions much like an adding machine that performs and records calculations.

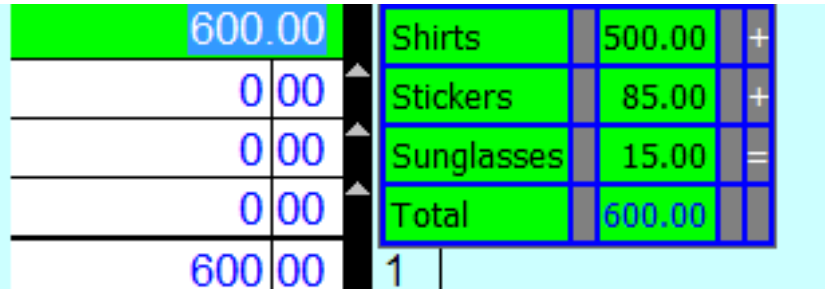
Tape options are managed in the **Options -> Environment… -> Edit** tab in ProFile.

**Attaching a tape:**

1. Open a file in ProFile.
2. Select a field to attach a tape.
3. Right-click and select the **Attach Tape** option from the menu**.**

**The Tape** window displays.

4. Enter a **description** (for example, **Shirts**) into the left-side field of the table.
5. Enter a **value** (for example, **$500.00**) into the right-side field of the table.
6. Press the **<Tab>** key to cycle through the fields and start a new row.
7. Press the **<Enter>** key; the total is calculated and inserted into the selected field on the form.




The background color of the field changes to green when a field has a tape attached.

**Note:** Only the sum of a tape - not individual entry details - are printed or transmitted with the tax return data. The details and descriptions are for preparer reference only.

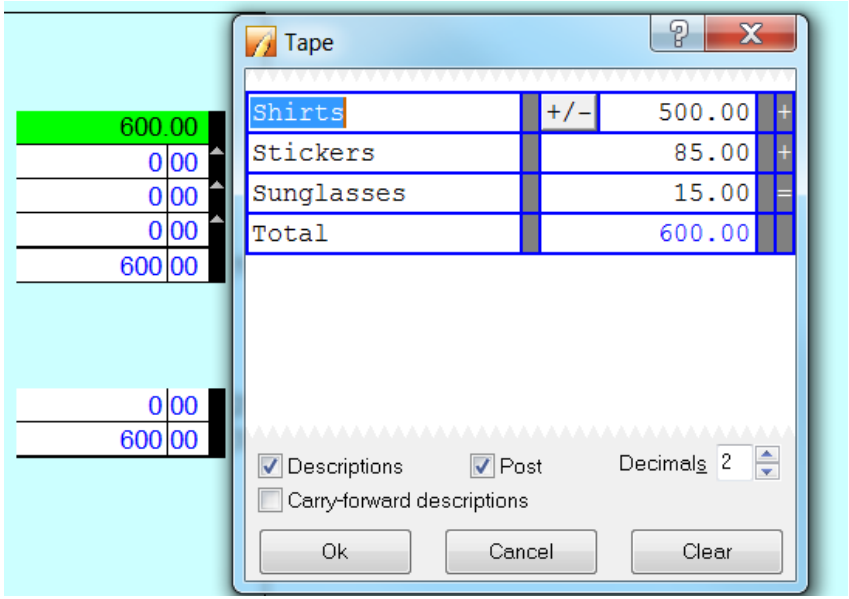
# Attaching Tapes in ProFile, Continued

**Clearing an Attached Tape:**

1. Open the file with the attached tape in ProFile.
2. Select the field from which an attached tape is to be cleared.
3. Right-click and select the **Attach Tape** option from the menu**.**

The **Tape** window displays.

4. Click the **Clear** button; the tape clears.
5. Click the **OK** button; the window closes and the tape clears from the field.




**Copying a Tape from One Field to Another:**

1. Open the file with the attached tape in ProFile.
2. Select the field with a tape attached.
3. Right-click and select the **Copy Memo/Tape** option from the menu**.**
4. Select the destination field for the copied tape.
5. Right-click the destination field and select the **Paste Memo/Tape** option from the menu.

The tape attaches to the destination field.

**Note:** When pasting a tape to a destination field, the value of the destination field will be set to the total in the tape. If that destination field is also a calculated field, ProFile sets the override flag on that field.

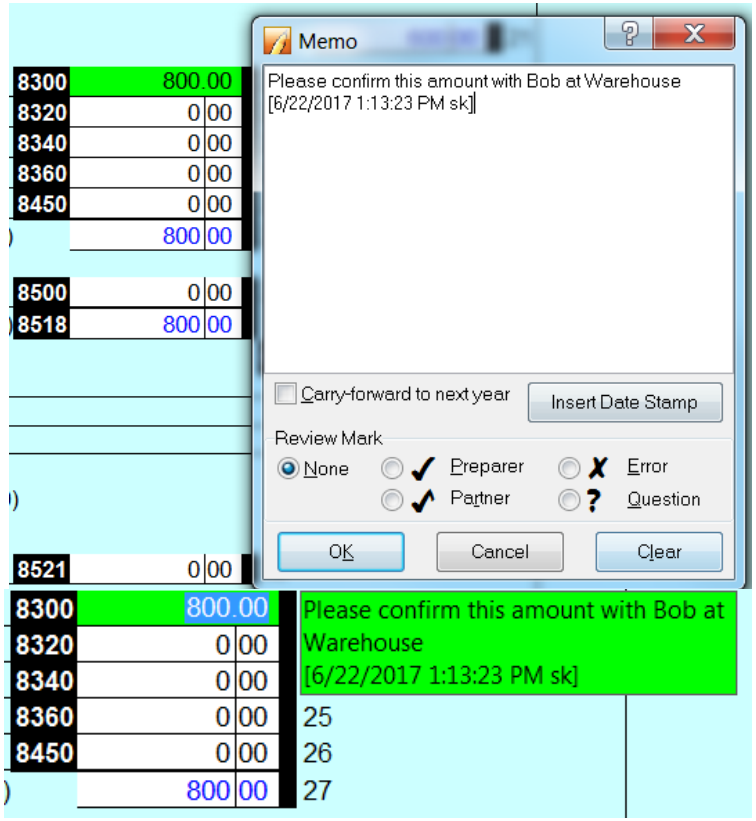
# Attaching Memos in ProFile

Preparers can attach memos to fields on all ProFile forms. Memos are short notes and reminders, like sticky notes. Memos are useful for leaving notes or reminders for partners or reviewers to read.

**Note:** Memos do not print or transmit over the Internet with a tax return file or affect the calculation of a return.

Memo text displays in a pop-up window when hovering the mouse over a field with a memo.

Fields with attached memos also appear in the Memo and Summary tabs in the Active Auditor.




**Attaching a memo:**

1. Right-click in a field and select the **Attach memo** option from the menu.

The **Memo** window displays.

2. Enter the memo content into the text field in the **Memo** window.
3. Click the **OK** button.

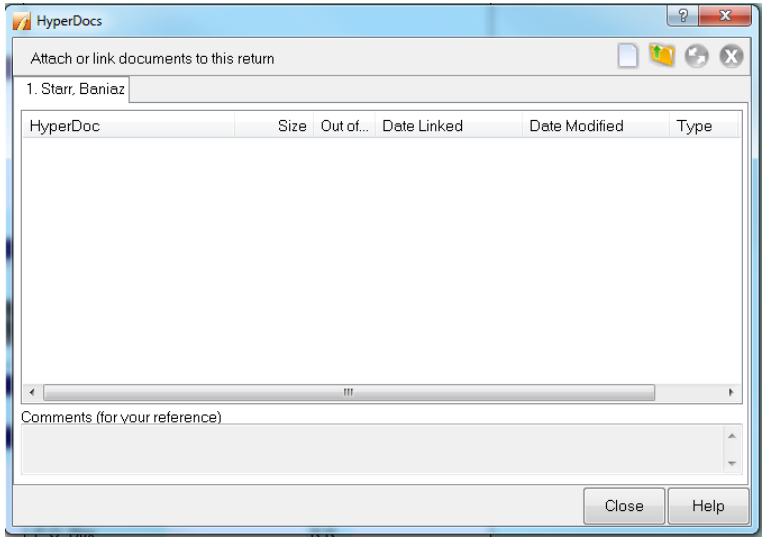
The memo attaches. The color background of the field changes to green.

**Clearing a memo:**

1. Right-click in a memo field and select the **Attach memo** option from the menu.
2. Click the **Clear** button.
3. Click the **OK** button.

The memo text clears from the form field.

# Attaching Hyperdocs in ProFile




ProFile's HyperDocs feature allows multiple documents in any format to attach to a form or field in a return.

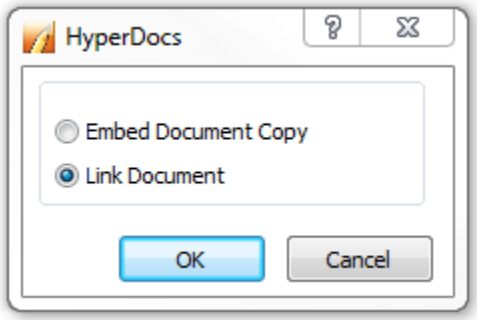
**Note:** HyperDocs are stored with the preparer files but are not included with T1 EFILE or TP1 NETFILE transmissions.

**Attaching HyperDocs:**

1. Open a form in ProFile.
2. Select the field to attach a HyperDoc.
3. Select the **HyperDocs…** option from the **File** drop-down menu in the top toolbar.

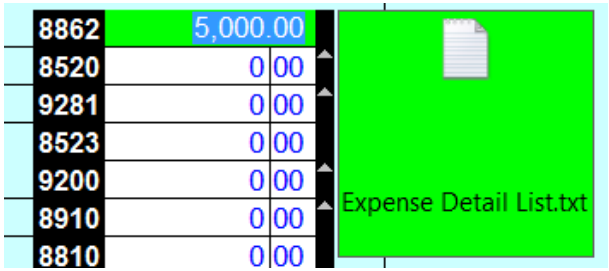
The **HyperDocs** window displays.

4. Click the **Add** button in the top-right corner of the window.
5. Navigate to the location of the document to attach. Select the document and click the **OK** button.

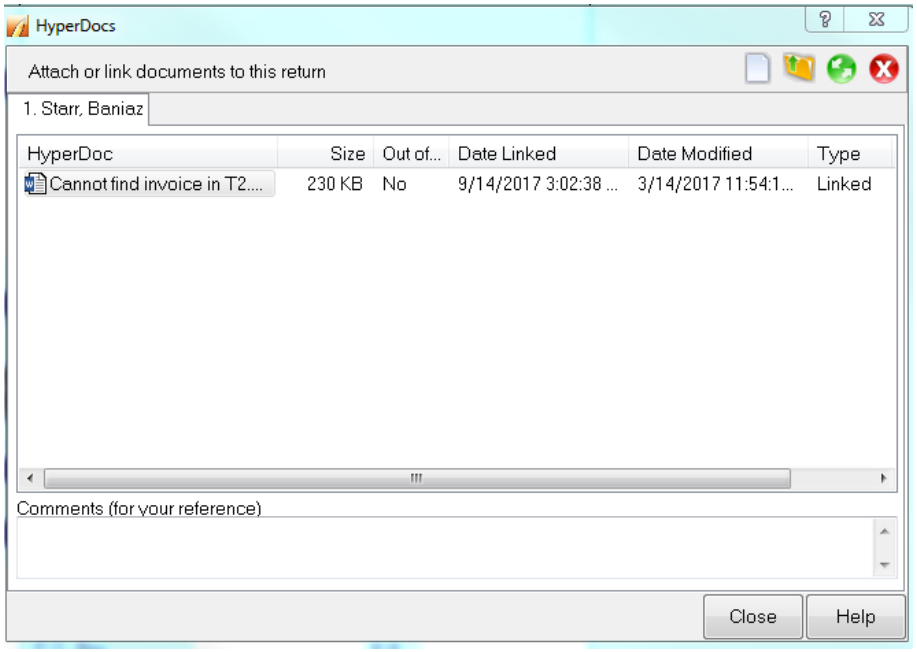



The **options** window displays.

6. Select one of the options presented:
   - **Embedded** documents open in read-only state and cannot be edited in ProFile
   - **Linked** documents open from the source and can be edited in ProFile; any changes are saved in the source document in the file location
7. Click the **OK** button; the document attaches to the field as a HyperDoc. The field displays in green color, indicating the HyperDoc attachment.



# Attaching Hyperdocs in ProFile, Continued




**Detaching HyperDocs from a field:**

1. Right-click on the field with the attached HyperDoc.
2. Select the **Detach HyperDoc** option from the menu.

The document detaches and the field restores to its default color.

**Note:** The document remains attached to the form but is not linked to a specific field.

**Removing HyperDocs from a form:**

1. Select the **Hyperdocs…** option from the **File** drop-down menu in the top toolbar.

The **HyperDocs** window displays.

2. Select the document from the HyperDoc list of attached documents.

The red **X** logo in the top-right corner activates.

3. Click the red **X** logo.
4. Click the **Yes** button to confirm the removal of the document.

The document detaches from the form.

# Attaching Documents for EFILE of TP1 Returns with the Attach a Doc Feature

**When are attachments transmitted?**

Revenu Quebec (RQ) allows the transmission of supporting documentation via ProFile's Attach a Doc feature after an amended return has been sent but before a notice of assessment (NOA) has been returned by RQ.

**What files types are supported?**

The following file types can be transmitted as attachments:

- .pdf
- .jpg
- .jpeg
- .tiff
- .tif

**What is the maximum attachment size?**

The maximum attachment size is 20 megabytes (MB); this is an RQ limitation.

**Is there a limit to the number of attachments transmitted?**

Submissions are limited to 25 attachments each; this is an RQ limitation.

Click here to review our support article on using the Attach a Doc feature for TP1.

# Setting up Data Monitors in ProFile

ProFile's Data Monitor feature displays any number of fields at the bottom of the Edit window. By default, the software monitors several key fields in the client file. Preparers can observe the totals for these fields change while working on different forms in ProFile.

**Selecting fields for data monitoring**

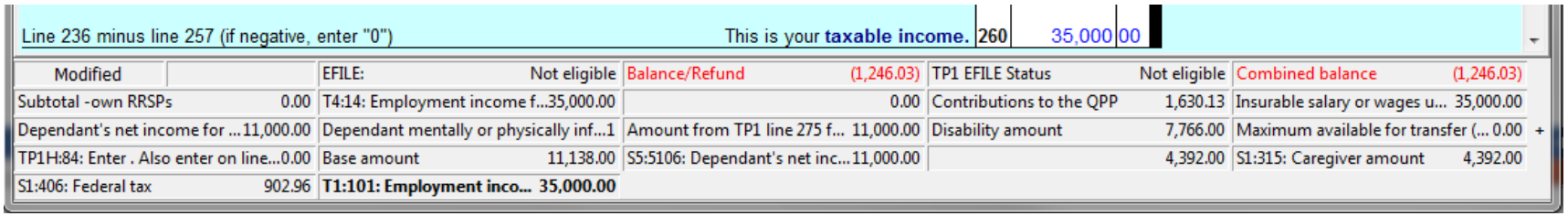
You may decide to monitor different fields. Then, as you make changes in other areas of the file, look at the bottom of the screen to see the effect those changes have on the fields you are monitoring.

A monitor amount that appears bold means that the field was affected by the last recalculation. A monitor amount that appears in red is a negative number.

**Hint:** Right-click on the **Data Monitor** and select **Monitor** from the menu to access several options, including the option to rename the monitor field description. This makes it easy to remember what is being monitored.

**To monitor a data field to the Data Monitor:**

1. Click and hold on the field. After a brief pause, the cursor will change to an arrow carrying a white square.
2. To replace another field already on the Data Monitor, drag the cursor to that cell and release the mouse button. The field code (or name, if there is one), along with the current value of the field, will appear in the monitor cell.
3. To add a new cell to the Data Monitor (on a new row, if necessary) drag the white square and release your mouse button when the cursor is over top of the + symbol in the bottom right corner of the ProFile window.


Line 236 minus line 257 (if negative, enter "0")
This is your taxable income. 260 35,000 00
Modified
EFILE: Not eligible
Balance/Refund (1,246.03)
TP1 EFILE Status Not eligible
Combined balance (1,246.03)
Subtotal -own RRSPs 0.00
T4:14: Employment income f... 35,000.00
0.00
Contributions to the QPP 1,630.13
Insurable salary or wages u... 35,000.00
Dependant's net income for ... 11,000.00
Dependant mentally or physically inf... 1
Amount from TP1 line 275 f... 11,000.00
Disability amount 7,766.00
Maximum available for transfer (... 0.00
TP1H:84: Enter . Also enter on line... 0.00
Base amount 11,138.00
S5:5106: Dependant's net inc... 11,000.00
4,392.00
S1:315: Caregiver amount 4,392.00
S1:406: Federal tax 902.96
T1:101: Employment inco... 35,000.00

**Related Articles:**

Review the support article on adding more than four (4) data monitors.

Review the support article on transferring data monitors to a new computer.

# Using Multiple Windows in ProFile

The multiple windows feature allows the preparer to view two ProFile returns, each in its own window. This is a useful feature when the preparer needs to see two returns side-by-side for clarity or comparison. For example, a preparer can open two T1 returns and view them at the same time, rather than having to toggle back-and-forth between them.

**Opening multiple windows outside ProFile:**

1. Open two or more returns in ProFile.
2. Click the **tile window** icon in the ProFile top toolbar.

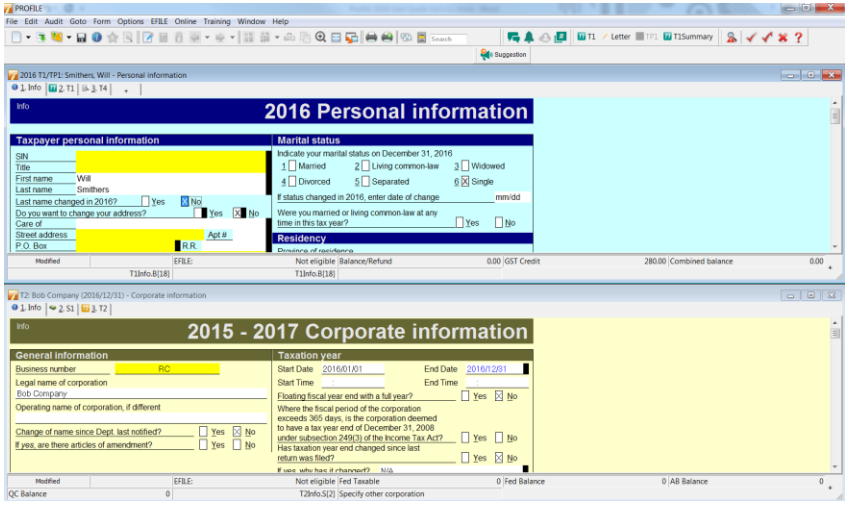
The returns open in individual windows on the desktop.

3. Click the **tile window icon** in each individual window to collapse the return back into ProFile.

**Opening multiple windows inside ProFile:**

Open two or more returns in ProFile.

1. Select the appropriate option from the **Window** drop-down menu in the top toolbar. These include:
    - **Tile Horizontally:** the returns are stacked on top of each other
    - **Cascade:** the returns each open in a smaller window that can be manipulated
    - **Launch Current Window:** the current return opens in a new window outside ProFile




**Toggling between multiple open returns:**

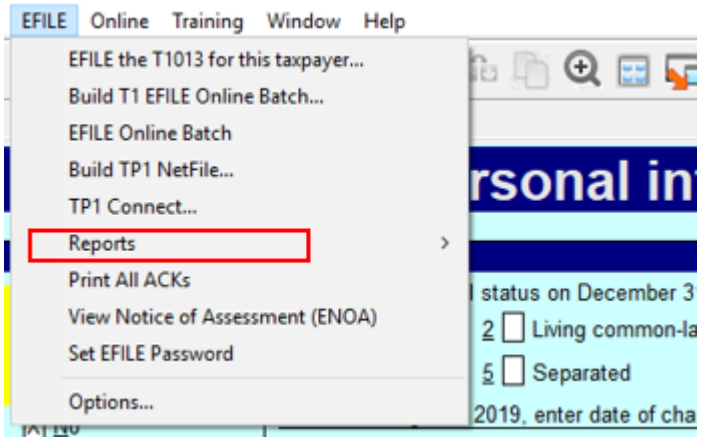
1. Select the **Window** drop-down menu in the top toolbar.

Any open returns display at the bottom of the menu; the active window is marked with a check mark.

2. Select any return listed in the menu to display it.

# Viewing EFILE Reports in ProFile

EFILE reports provide preparers with the date, time, and the confirmation number of the EFILE from CRA.




**To view reports from files used during current EFILE and NetFile services:**

1. Select the **Reports** option from the **EFILE** drop-down menu in the top toolbar, and then select the **Current** option.

The **Open EFILE Report** window displays.

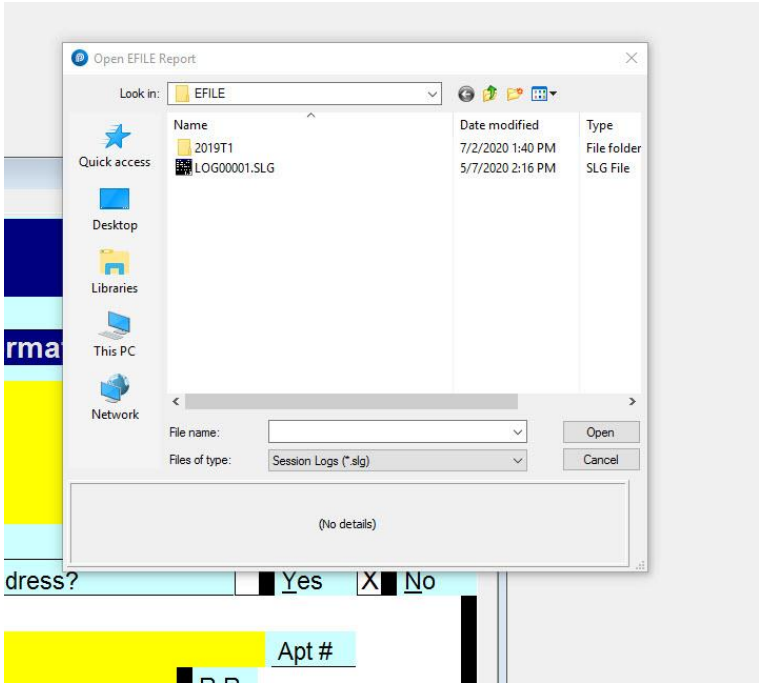
2. Select the type of file in the **Files of type** field from which you want to generate a report:

    - EFILE Submission files (*.TAX)
    - TP1 NetFile Submission files (*.EAX)
    - Session logs (*.SLG)

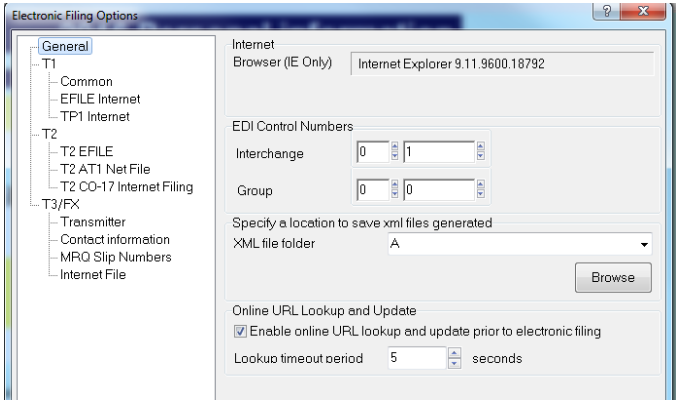
3. Session logs are descriptions of events that occurred while you were connected to the NetFile Québec website. If you choose Session logs, select a session log and click the **Open** button to view the full report.

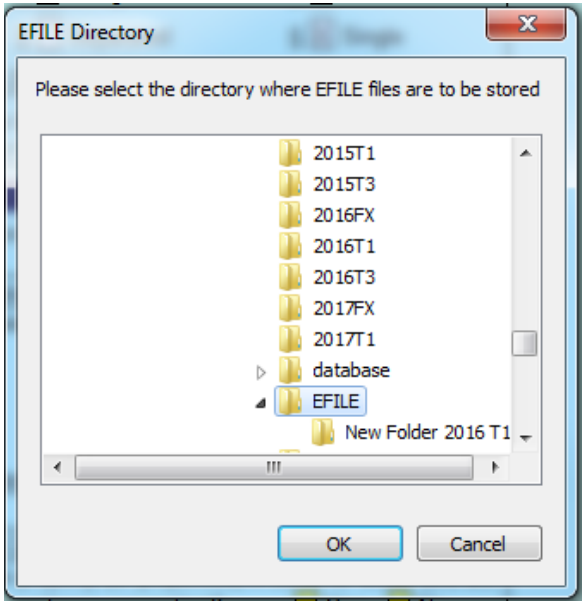
4. For other file types, select the option and click the **Open** button; ProFile displays the report information.

5. Click the **Print** button from the report to print a copy for your records.



# Viewing EFILE Reports in ProFile, Continued




**Setting up a shared EFILE folder**

If you installed ProFile onto a shared network folder, you can use the default folders created during installation. For each module that uses EFILE, you will find appropriate EFILE folders within each module's files folder.

Alternatively, you can use any shared folder on your network as a shared EFILE folder. To do so, you must specify that folder on each workstation.

**For T1/TP1 returns:**

1. Select the **Options…** entry from the **EFILE** drop-down menu in the top toolbar.
2. Select the option for the EFILE service that you want to configure from the left-side menu.
3. Select the **Common** option under the **T1** section of the **General** menu.
4. Click the **Browse** button; the **EFILE Directory** window displays.
5. Navigate to the folder used as a shared EFILE folder.
6. Click the **OK** button.
7. Click the **OK** button in the **EFILE options** window; the folder is assigned.

**For T2 returns:**

1. Select the **T2 EFILE** option under the **T2** section of the **General** menu.
2. Click the **Browse** button; the **EFILE Directory** window displays.
3. Navigate to the folder used as a shared EFILE folder.
4. Click the **OK** button.
5. Click the **OK** button in the EFILE options window; the folder is assigned.

# What Can Undergo EFILE in ProFile

The CRA makes changes each tax year as to what can (and cannot) undergo the EFILE process.

ProFile maintains a support article that addresses the EFILE status of all modules, as well as independent forms that undergo EFILE separately from the return (for example, **T1135**, etc.).

Review the full list of forms and years of what can undergo EFILE from ProFile.

# Managing T1 Returns in ProFile

# Overview of T1 Module in ProFile

**What is a T1?**

The T1 General Tax Form (usually referred to as a "T1") is used by individual Canadians to complete their personal income tax return.

It has five sections for personal and income information:

- **Identification:** For details including name, address, SIN and marital status
- **Total income:** For declaration of income, including employment, self-employment, disability, foreign income, and any others
- **Net income:** Where childcare expenses, union dues, and more are subtracted from total income
- **Taxable income:** Where allowable deductions like capital gains are subtracted from net income
- **Refund or balance owing:** Where it is determined if any money must be paid or any money is paid back

**Submission Dates for T1:**

April 30 of the following year is the deadline for most individuals to file a T1 return, or June 15 of the following year for self-employed individuals and their spouses or common-law partners.

In the event that April 30 falls on a weekend, the following Monday becomes the deadline.

If the individual owes money to the CRA, the due date of April 30 is the hard due date for filing.

Late payment results in penalties being applied by the CRA.

# Authorizing or Cancelling a Representative for T1

For tax year 2019 and going forward preparers need to use the form **Authorize a Representative** or **Cancel a Representative** for EFILE.

The T1013 form **Authorizing or Cancelling a Representative** was previously used to authorize a representative to access a taxpayer's tax information via the CRA. This process has now been replaced.

Review our support article detailing the current method of authorizing or cancelling authorization, or click here to learn about the change.

# Using T1135 EFILE for T1 in ProFile

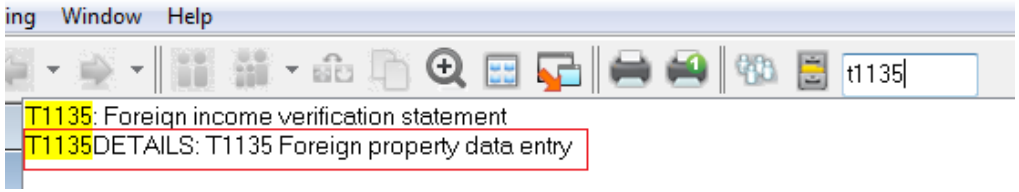
All Canadian resident taxpayers (including non-resident trusts deemed resident in Canada by section 94 of the Act) are required to file Form T1135, *Foreign Income Verification Statement*, if at any time in the year the total cost amount of all specified foreign property to the taxpayer was more than $100,000 (CAD).

**Note:** The T1135 does not EFILE with a T1 or T2; it must undergo EFILE independently.

**Finding the T1135:**

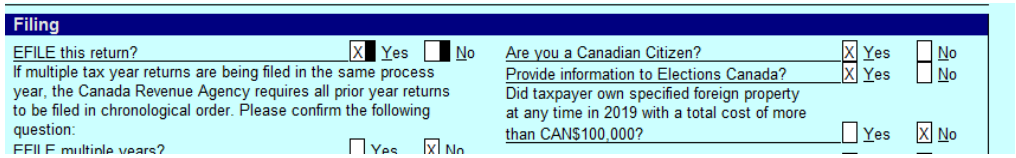
Enter **t1135** into the forms search bar in the top toolbar menu. Select **T1135 Foreign income verification statement** from the search results.

The initial question is located in the **Filing** section of the T1 **Info** tab.




**EFILE the T1135:**

1. Ensure the related **Yes/No question** is answered affirmatively on the T1 **Info** tab.
2. Select the **EFILE the T1135…** option from the **EFILE** drop-down menu in the top toolbar; a transmission window displays indicating that the T1135 is ready to transmit.
3. Click the **OK** button; the T1135 transmits to CRA and a confirmation number is provided.


Filing
EFILE this return? X Yes No
If multiple tax year returns are being filed in the same process year, the Canada Revenue Agency requires all prior year returns to be filed in chronological order. Please confirm the following question:
EFILE multiple years? Yes X No
Are you a Canadian Citizen? X Yes No
Provide information to Elections Canada? X Yes No
Did taxpayer own specified foreign property at any time in 2019 with a total cost of more than CAN$100,000? Yes X No

**Note:** The confirmation number can also be viewed on the information tab of a T1 or T2 return, post-transmission.

**Related Articles**

Common questions regarding T1135 are found on the CRA website.

Review the support article regarding the T1135.

# Using CRA Data Import with AFR for T1 in ProFile

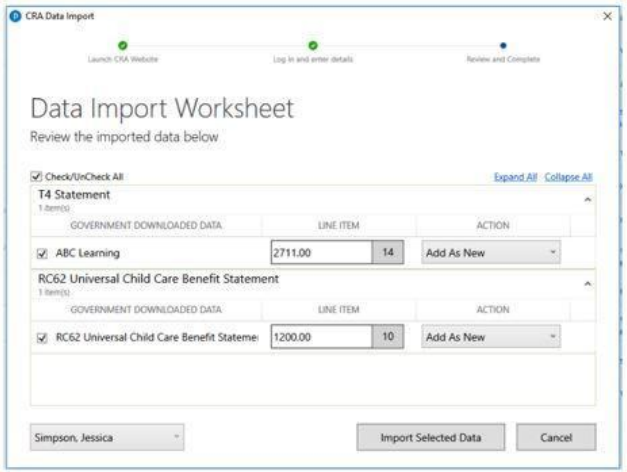
CRA Data Import
ProFile CRA Data Import
Quick. Easy. Secure
Save time by automatically importing client information
Prevent manual data entry errors
Ensure client data is always accurate and up-to-date

Auto-Fill My Return (AFR) is a secure CRA service. It allows authorized representatives to electronically request and receive certain tax information to fill in parts of their client's income tax and benefit return. ProFile offers the service for both single and multiple individual T1 returns.

**Acquiring AFR permissions**

The tax preparer must have a valid authorization from the taxpayer to access the Represent a Client website. There are two ways to acquire this authorization:

- The taxpayer can access CRA's **My Account** service. Preparers request that the taxpayer enter the Rep ID to authorize the preparer as an individual, a Group ID to authorize a group of representatives, or a business' Business Number (BN) to authorize all employees of a business
- Request the permission of the taxpayer via a **T1 Authorize a representative** submission




**Importing data with AFR:**

1. Open or create a T1 return.
2. Select the **Import CRA data** option from the **File** drop-down menu in the top toolbar; the **CRA Data Import Tool** window displays.
3. Click the **Launch CRA Website** button; the CRA's **Represent a Client** window launches in a separate browser window.
4. Sign in to the CRA site. The **CRA Data Import** window lists the clients whose SINs can be entered into the CRA website.
5. Select the client and click the **Next** button to provide confirmation; the CRA system processes the request. The **Successfully Connected** message displays when the connection has been made between the ProFile and CRA systems.
6. ProFile's **Data Import Worksheet** window displays; the default display setting is the basic view. Click the + icon next to each statement to reveal the expanded view, which displays more details.
7. Review the data and forms to be imported; if correct, click the **Import Selected Data** button. Click the **Close** button.
8. To review the data imported, click on the **Data Import** tab in ProFile's Auditor.

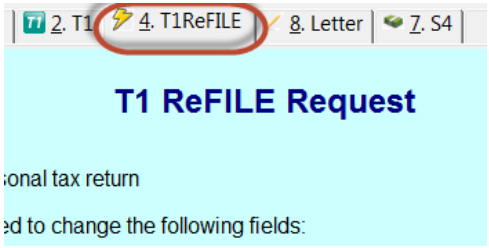
# Using ReFILE for T1 in ProFile

If you are an EFILE service provider, you can use ReFILE to send T1 adjustments online for tax years 2017, 2018, 2019, 2020, and 2021 on behalf of your clients. The ReFILE service allows you to change the same lines that individual taxpayers can with the Change my Return service in My Account.

### Who can use ReFILE?

Preparers can use the ReFILE service under the following conditions:

- You have ProFile version 2016.4.3 or later (for tax years 2017, 2018, 2019, 2020, and 2021)
- You have level 2 authorization from your client
- The initial return was filed online via EFILE
- The initial return was assessed
- You have acquired a new sign-off of a revised T183 from client




### What tax years does ReFILE support?

ReFILE is supported for 2017, 2018, 2019, 2020, and 2021 tax years with the latest ProFile version.

### Undertaking the ReFILE process

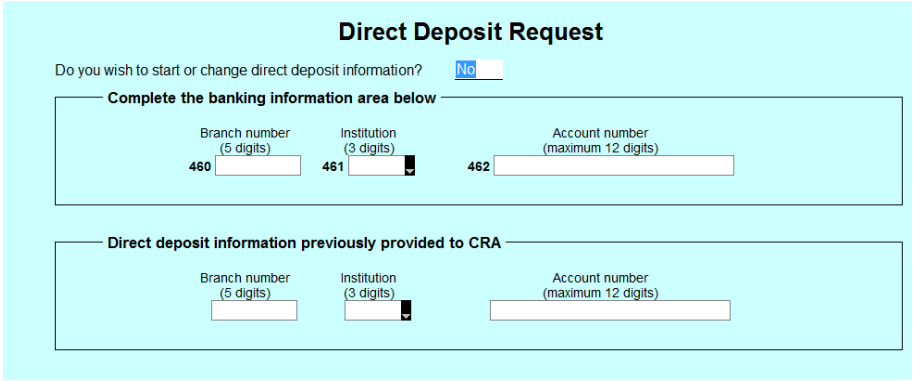
1. Open a T1 return that has already undergone EFILE and for which a CRA assessment has been received.
2. Save the return as a new file, using the **Save As...** option from the **File** drop-down menu in the top toolbar.
3. Enter the new information that mandates a ReFILE into the return. For example, a client has received an unexpected T4 indicating additional income.
4. Open a **T1ReFILE** form.
5. Ensure the client information (SIN, Name) is correct and enter the current date in the **Date of ReFILE** field.
6. Select the **Yes** option in the **Is this an amended tax return?** field.
7. Reprint and get the client to sign off on a new T183.
8. Select the **EFILE/ReFILE this return** option from the **EFILE** drop-down menu in the top toolbar.

You will get a new confirmation number on the return's **Info** page.

# Using a Direct Deposit Request in ProFile

The **Direct Deposit Request form** allows a refund, tax credit, or payment to directly deposit into a taxpayer's account.

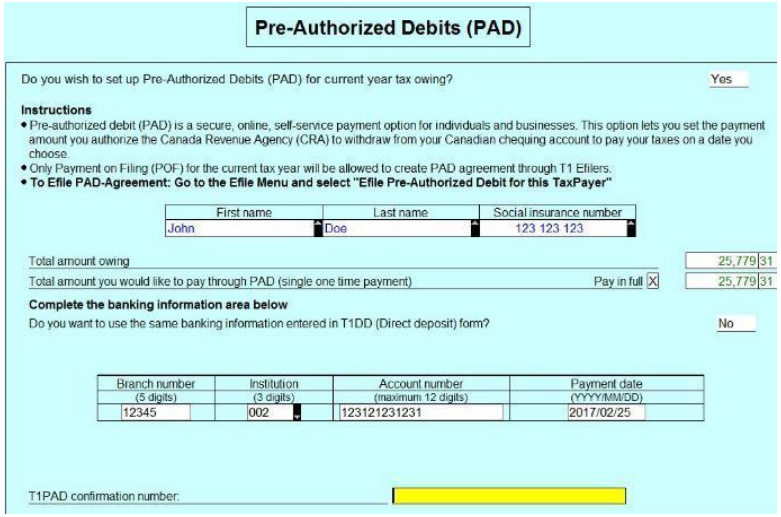
If you used EFILE to file a return, complete the Direct Deposit Request form to change the direct deposit information already provided to the CRA.




### Regarding Direct Deposit service

Do not complete this form if you already use the direct deposit service and your banking information has not changed.

Your direct deposit request will stay in effect until you change the information or cancel the service.


Pre-Authorized Debits (PAD)
Do you wish to set up Pre-Authorized Debits (PAD) for current year tax owing?
Yes
Instructions
• Pre-authorized debit (PAD) is a secure, online, self-service payment option for individuals and businesses. This option lets you set the payment amount you authorize the Canada Revenue Agency (CRA) to withdraw from your Canadian chequing account to pay your taxes on a date you choose.
• Only Payment on Filing (POF) for the current tax year will be allowed to create PAD agreement through T1 Efilers.
• To Efile PAD-Agreement: Go to the Efile Menu and select "Efile Pre-Authorized Debit for this TaxPayer"
First name
John
Last name
Doe
Social insurance number
123 123 123
Total amount owing
25,779 31
Total amount you would like to pay through PAD (single one time payment)
Pay in full X
25,779 31
Complete the banking information area below
Do you want to use the same banking information entered in T1DD (Direct deposit) form?
No
Branch number (5 digits)
12345
Institution (3 digits)
002
Account number (maximum 12 digits)
123121231231
Payment date (YYYY/MM/DD)
2017/02/25
T1PAD confirmation number:

### Eligible deposit types

The form is for the following types of deposits:

- Income tax return refund
- Goods and Services Tax / Harmonized sales tax credit (GST/HST), including certain related provincial payments
- Working Income Tax Benefit (WITB) advance payment
- Canada Child Tax Benefit payment
- Universal Child Care Benefit payment
- Canada Pension Plan payment
- Old Age Security payment
- Veterans Affairs payment

You can also use the online Direct Deposit form if you do not use EFILE and you need to update your banking information with the CRA.

# Using Preauthorized Debit (PAD) for T1 in ProFile

Pre-Authorized Debit (PAD) is a CRA feature that allows tax professionals to submit a payment to CRA on behalf of taxpayer clients who have an amount due on their current-year T1 Personal returns. This feature saves the taxpayer time over printing a T7DR(A) form and making the payment in-person at their Bank.

**Note:** Complete a PAD and EFILE it for each taxpayer. If there is a spouse with balance owing, the spouse requires his or her own PAD form to be completed and undergo EFILE.

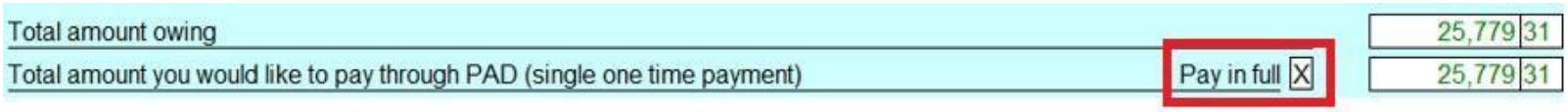
**Completing the PAD Form:**

1. Complete the taxpayer's T1 Personal return in ProFile and EFILE.
2. Select the **Form Explorer** option from the ProFile **GoTo** menu.
3. Search for **T1PAD** and open the **PAD form**.

**Note:** If the taxpayer has completed the T1DD form, you can retrieve their banking information from the T1DD to automatically populate the PAD form.

4. Change the **Do you wish to set up Pre-Authorized Debits (PAD) for current year tax owing** value from **No** to **Yes**:

5. Enter the amount to be paid into the **Total amount you would like to pay through PAD (single one-time payment)** field.
6. For payment in full, check the **Pay in full** checkbox. For partial payment, enter the amount in the value field.




7. Enter a payment date; the date must be between five business days (not including holidays) and one year in advance of the current date.
8. Enter details of the bank and account the payment is being made from.

The PAD form is completed.

# T1: Preauthorized Debit (PAD), Continued

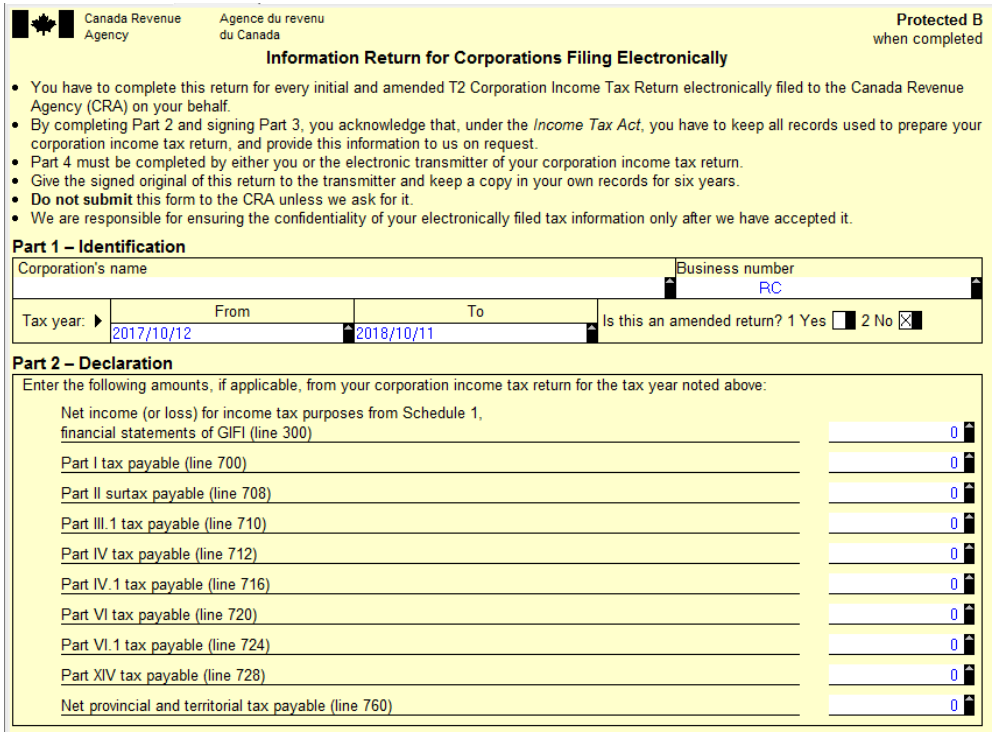
**Completing the T183 Form:**

1. Select the **Form Explorer** option from the **GoTo** drop-down menu in the top toolbar.

2. Search for **T183** and open the **T183 form** from the results.

**Note:** The majority of content for the T183 form sources from the preparer information entered under the **Options > Environment…** menu.

3. Complete the T183 form and the related second page.



Canada Revenue Agency | Agence du revenu du Canada

**Protected B** when completed

**Information Return for Corporations Filing Electronically**

- You have to complete this return for every initial and amended T2 Corporation Income Tax Return electronically filed to the Canada Revenue Agency (CRA) on your behalf.
- By completing Part 2 and signing Part 3, you acknowledge that, under the *Income Tax Act*, you have to keep all records used to prepare your corporation income tax return, and provide this information to us on request.
- Part 4 must be completed by either you or the electronic transmitter of your corporation income tax return.
- Give the signed original of this return to the transmitter and keep a copy in your own records for six years.
- **Do not submit** this form to the CRA unless we ask for it.
- We are responsible for ensuring the confidentiality of your electronically filed tax information only after we have accepted it.

**Part 1 – Identification**

| Corporation's name | Business number |
|---|---|
| | RC |

| Tax year: | From | To | Is this an amended return? 1 Yes ☐ 2 No ☒ |
|---|---|---|---|
| | 2017/10/12 | 2018/10/11 | |

**Part 2 – Declaration**

Enter the following amounts, if applicable, from your corporation income tax return for the tax year noted above:

| | |
|---|---|
| Net income (or loss) for income tax purposes from Schedule 1, financial statements of GIFI (line 300) | 0 |
| Part I tax payable (line 700) | 0 |
| Part II surtax payable (line 708) | 0 |
| Part III.1 tax payable (line 710) | 0 |
| Part IV tax payable (line 712) | 0 |
| Part IV.1 tax payable (line 716) | 0 |
| Part VI tax payable (line 720) | 0 |
| Part VI.1 tax payable (line 724) | 0 |
| Part XIV tax payable (line 728) | 0 |
| Net provincial and territorial tax payable (line 760) | 0 |

**EFILE the PAD Form from the T1:**

1. Return to the taxpayer's T1 form that underwent EFILE.

2. Select the **EFILE Pre-authorized Debit for this taxpayer...** option from the **EFILE** drop-down menu in the top toolbar.

The PAD form undergoes EFILE; the preparer receives a confirmation number that populates the PAD form (field **T1PAD confirmation number**) and on the information page following the EFILE.

**Additional information**

Read the CRA guide on PAD for more information.

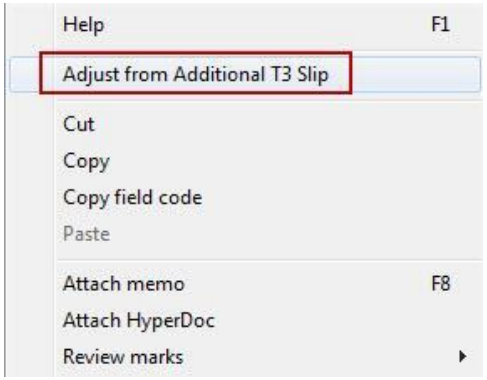
Review a detailed support article on PAD for ProFile customers.

# Completing a T1 Adjustment

ProFile can automatically calculate the T1-ADJ form in the event an adjustment is required.

**Note:** ProFile recommends using the ReFILE feature where possible: it is a faster and easier-to-use experience when compared to undertaking a T1 adjustment. Use T1 adjustment where ReFILE is not an option.

In addition, note that a T1-ADJ form cannot be electronically filed.




**Using form T1-ADJ:**

1. Open a T1 client data file that you created and have previously filed (to retain the original tax return, select the **Save As** option from the **File** drop-down menu in the top toolbar and save the return with a modified name).
2. Select the option **Snapshot/variance** from the **Audit** drop-down menu in the top toolbar; the **Snapshot/variance** window displays.
3. Click the **New** button; a new entry displays in the **Active:** list.
4. Name the snapshot something that identifies why the return is being adjusted (for example, **Additional T3 slip**) and click **OK**. This records amounts in key fields that ProFile will check for variance after the return adjusts.
5. Navigate to the form or slip that requires adjustment and key in the new values.
6. Use the **Form Explorer** (or press **<F4>**) to open a copy of the **T1ADJ**. ProFile allows unlimited copies of this form to be made, so additional adjustments to the return can be filed as necessary.
7. Right-click on the form and select the **New** option from the menu to create another copy.
8. Right-click on the **T1-ADJ** form and select the **Adjust from [snapshot name]** option with the name of the snapshot.
9. ProFile compares the original return to the revised data. The software automatically detects the impact on all relevant fields, and completes the table with line numbers, names and changed amounts. This only applies to fields with CRA line numbers.
10. There is a free-form area on the T1-ADJ where **Other details or explanations** are provided. To create separate paragraphs in this section, use **<Shift + Enter>** to start each new paragraph.
11. Print a copy of the T1-ADJ and mail it to the CRA; there is no need to submit a full return.

# Completing a T1 Adjustment, Continued

**Mailing form T1-ADJ**

The CRA maintains an up-to-date list of all tax centers where T1-ADJs can be mailed.

Review the CRA list here.

**Related Articles**

Review the support article for additional details.

# Using Express Notice of Assessment (ENOA) for T1 in ProFile

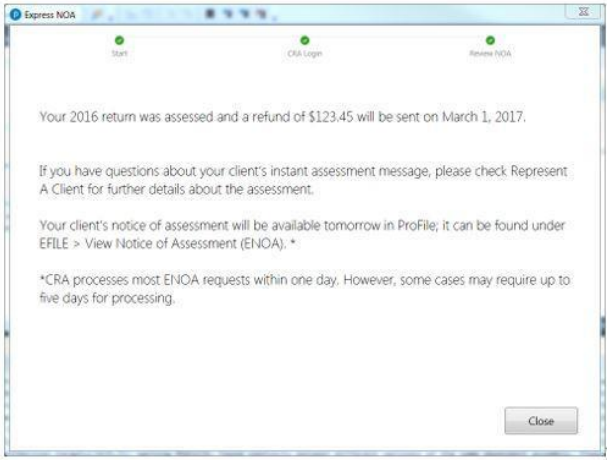
ENOA is a CRA service that allows individuals and authorized representatives to view the basic result of an assessment immediately after filing a return and to receive the full notice of assessment the next day.

The instant assessment results provide the status of the return with a summary of the refund, amount owing, or a zero balance and deposit information, if applicable.

The full notice of assessment provides an account summary with the result of the assessed return showing a refund, a zero balance, or a balance owing, tax assessment summary, explanation of changes and other information, and RRSP/PRPP deduction limit statement.

**Note:** While the CRA processes most ENOA requests within 24 hours, some cases may require up to five days for processing.

Express NOA
Login to Review NOA
The (2016) tax return for (Smith, John) has been assessed. To view your clients most recent assessment/reassessment details, login to the Express NOA service within your software.
The same selection criteria for verifying income tax returns are used for both paper and electronic versions. Your client needs to keep all tax information slips and documents for six years after you filed the tax return. Please keep this confirmation number and DCN for your records: N/A
If this ENOA request is for a spousal return, select the spouse for whom it applies from the drop-down menu below.
870002359 John
Launch CRA Website
Cancel


Express NOA
Your 2016 return was assessed and a refund of $123.45 will be sent on March 1, 2017.
If you have questions about your client's instant assessment message, please check Represent A Client for further details about the assessment.
Your client's notice of assessment will be available tomorrow in ProFile; it can be found under EFILE > View Notice of Assessment (ENOA). *
*CRA processes most ENOA requests within one day. However, some cases may require up to five days for processing.
Close

**Making the initial ENOA request:**

1. Open the return that ENOA is being sought for.
2. Select the **View Notice of Assessment (ENOA)** option from the **EFILE** drop-down menu in the top toolbar. The **ENOA wizard** displays in ProFile. Review the wizard content and click the **Next** button.
3. If this is a spousal return, select a specific spouse from the drop-down menu, then click the **Launch CRA Website** button
4. The ENOA wizard indicates that the CRA website is launched in a separate browser window. Navigate to the **CRA Login** browser window and enter the user ID and password information. Click the **Login** button.

In the CRA web browser, the ENOA **request processing** status displays.

5. The CRA web browser displays the SIN of the client for whom the ENOA request is being made; if the number correctly corresponds to the client, click the **Next** button.

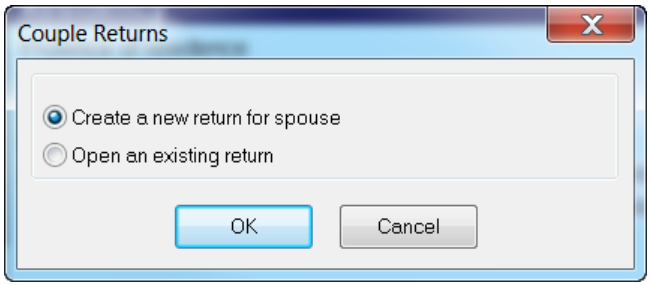
A new browser displays the details of the successful ENOA request; this page can be saved or printed.

6. Click the **Close** button; it is now necessary to wait a minimum of 24 hours to repeat the request and acquire the full ENOA summary.

**More information:** Review our support article for more information on ENOA and FAQ.

# Using Couple's Returns for T1 in ProFile

**Creating a couple's return:**




1. Open or create the T1 return for the client.
2. On the **Info** form, select either **Married** or **Living common-law** for the marital status.
3. Click the **Switch to spouse** button on the top toolbar menu; the **Couple Returns** window displays.
4. Choose whether to create a new return for the spouse, or couple the file to an existing return.

- Select **Create a new return for spouse** to open a new return for the spouse, or;
- Select **Open an existing return** to browse to a file on your hard drive and select it

**Note:** After combining the data, ProFile will ask if you want to delete the original file for the spouse. Delete the file to avoid duplication or possible confusion of the original spouse's file and the same return in the new coupled file.

5. Select the **Save** option from the **File** drop-down menu in the top toolbar.

ProFile saves both spouses' tax returns in the same data file. This keeps the tax returns together as file operations are performed on the tax return file (for example, backing up to a disk).

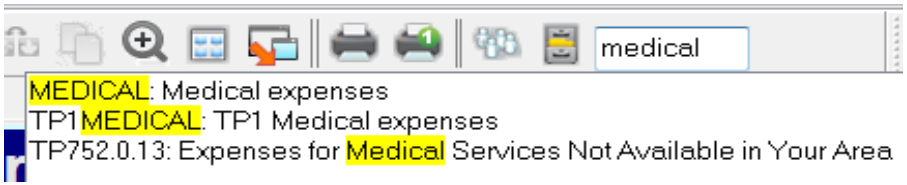
6. Once returns are coupled, select **<F5>** on the keyboard to toggle between the returns.

**Uncoupling a couple's return:**

1. Open the coupled return.
2. Select the **Uncouple** option from the **File** drop-down menu in the top toolbar menu.
3. Confirm the desire to uncouple the returns. ProFile automatically prompts the option to save the spouse's return in a separate file.
4. Click the **Save** button. The client's file keeps the coupled file name (for example, **Couple, Joe** and **Thelma.T08**). It may be renamed by selecting the **Save As** option from the **File** drop-down menu in the top toolbar.
5. On the **Info** form in each file, select **Widowed**, **Divorced**, **Separated** or **Single** for the marital status.

# Using a Medical Expense form for T1 in ProFile

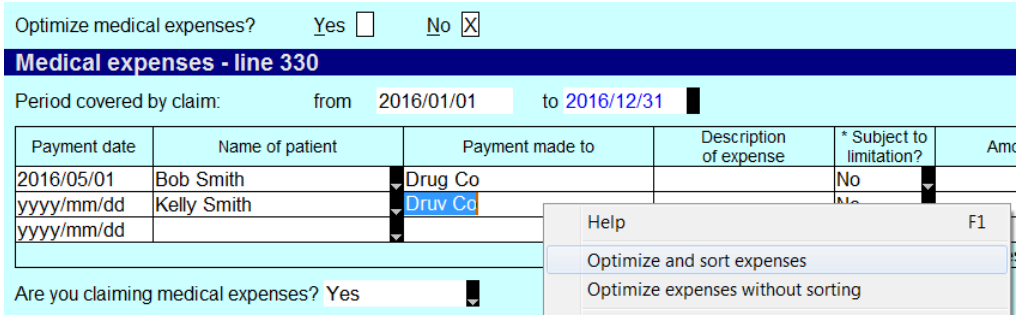
Taxpayers may claim medical expenses for any 12-month period that ends in the current tax year. Expenses already claimed on last year's tax return cannot be claimed again. Generally, all amounts paid can be claimed even if they were not paid in Canada.


medical
MEDICAL: Medical expenses
TP1MEDICAL: TP1 Medical expenses
TP752.0.13: Expenses for Medical Services Not Available in Your Area

**Opening the Medical Expense form:**

1. Search using the term **medical** in the ProFile search bar, located in the top toolbar menu.

2. Select the **Medical expenses** form displayed in the search results.




**For a coupled return:**

The Medical Expense form in ProFile automatically shares information between coupled returns.

1. To optimize medical expenses, select the **Yes** option to the **Optimize medical expenses?** question at the top of the form.

ProFile determines which taxpayer should claim the deduction at lines 330, according to the lowest net income (as long as the taxpayer can claim all expenses).

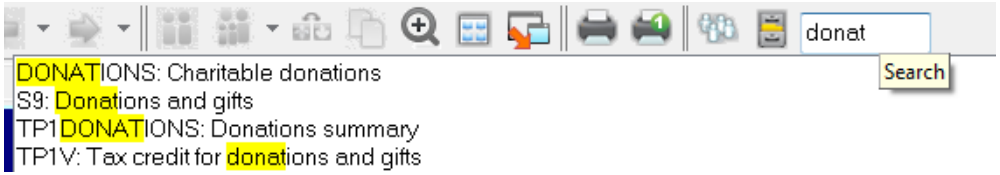
2. To decide independently which spouse should claim the deduction, select the **No** option to the **Optimize medical expenses?** question at the top of the form and select the **Yes** option to the **Are you claiming medical expenses?** question.

3. Select **Percentage** and enter it in the corresponding field for the current return to allocate a percentage to each spouse. The spouse's return will automatically reflect the remaining percentage.

# Using a Charitable Donations Form for T1 in ProFile

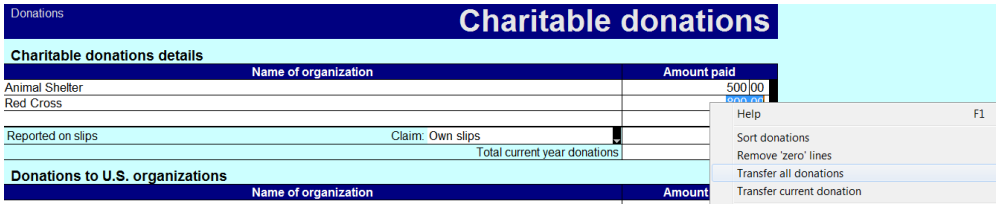
The ProFile Donations form is used to enter charitable donations for the taxpayer. Donations can be entered for both Canadian and U.S. organizations.

Search for the term **donations** in the ProFile search bar in the top toolbar menu; select the appropriate form (for example, **Charitable donations**).




**Carrying forward donations**:

If a return carried forward from a previous taxation year, ProFile copies the list of organizations into the **Charitable donations details** and **Donations to U.S. organizations** tables, but leaves amounts as **0**.




Any donation amounts can be entered to the same organizations for the current year in the appropriate rows.

1. When completed, delete the remaining organizations, right-click in each table and select the **Remove 'zero' lines** option.
2. If the taxpayer has donation amounts from slips (for example,T4 slips), enter those amounts on the related slip or slips (for example, **T4**, **T3**, **T2202A**, **T4A**, and **T5013**). ProFile automatically carries donation amounts from slips to the **Reported on slips** line in the **Donations** worksheet.

The donation carry forwards display at the bottom of the **Charitable donations** form. ProFile automatically claims older donations first to ensure that the taxpayer uses them before they expire; charitable donations for up to 5 years are eligible for carry forward.

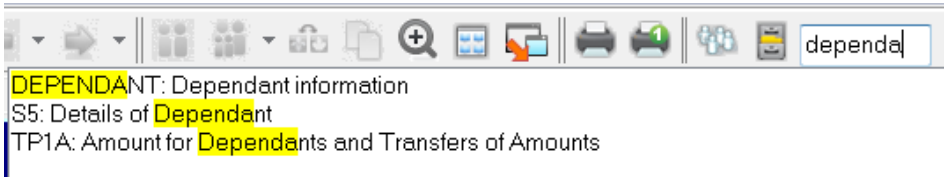
**Transferring donations to a spouse:**

1. Open the **donations form**.
2. Right-click on the form and select the option **Transfer all donations** or **Transfer current donation**.

The donations transfer to the spouse.

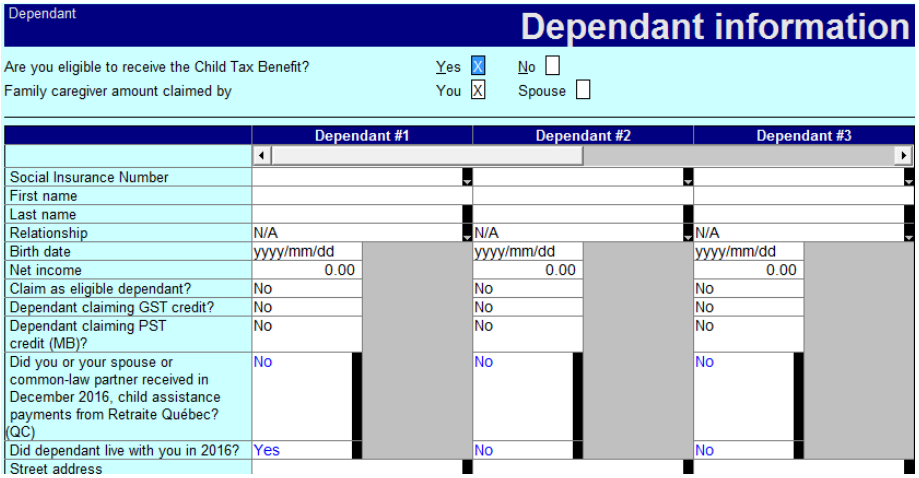
# Adding Dependants for T1 in ProFile

There is no limit to the number of dependants that can be added to the form; a new blank column displays when the last column provided is populated.


dependa
DEPENDANT: Dependant information
S5: Details of Dependant
TP1A: Amount for Dependants and Transfers of Amounts

**Completing the "Dependant information" form:**

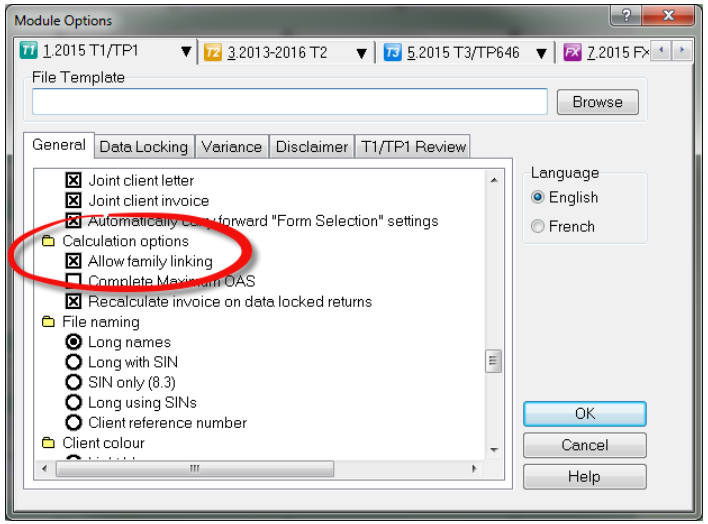
1. Enter the term **dependant** into the ProFile search field in the top toolbar menu; select the form from the search results (for example, **Dependant information**).
2. Enter the dependant information in full.


Dependant
Dependant information
Are you eligible to receive the Child Tax Benefit? Yes X No
Family caregiver amount claimed by You X Spouse
Dependant #1
Dependant #2
Dependant #3
Social Insurance Number
First name
Last name
Relationship N/A N/A N/A
Birth date yyyy/mm/dd yyyy/mm/dd yyyy/mm/dd
Net income 0.00 0.00 0.00
Claim as eligible dependant? No No No
Dependant claiming GST credit? No No No
Dependant claiming PST credit (MB)? No No No
Did you or your spouse or common-law partner received in December 2016, child assistance payments from Retraite Québec? (QC) No No No
Did dependant live with you in 2016? Yes No No
Street address

Personal information entered on the Dependant form automatically populates for both spouses, regardless of which is chosen.

**Selecting family linking:**

1. Select the **Module…** option form the **Options** drop-down menu in the top toolbar.
2. Ensure the **Allow family linking** option is checked in the **Allow family linking** section of the **General** tab.
3. Click the **OK** button.
4. Identify the dependent in the **Dependant information** form that to link.
5. Right-click in one of the dependent's form fields; select the **Return for** option from the menu.
6. Click the **Yes** button when asked **Create a new return for?**




The new return is created for the dependant.

# Family Linking for T1 Returns

A number of file management features make it easy to work with linked T1 or T1/TP1 files for members of the same family:

- Linking family returns
- Working with linked files
- Printing linked files
- Saving linked files
- Sharing income between spouses
- Sharing data between family members
- Estimating Child Tax Benefits
- Open and close family files

**Working with linked family files**

Once linked, family files can be opened and closed together.

If you prefer working with family files open together, open them all together when beginning to work on a set of family files.

If files were closed together, (for example, **File** -> **Close family**) ProFile will open the returns together.

If closing the file for one family member separately, automatic opening of all family files together will not occur until after the next time you open all the files at once.

**Switch between Family Members**

Use the toolbar icon, the **Form** menu or the **Window** menu to switch between open files for members of a family.

**Print Family Files**

When selecting the **File > Print** option for a linked file, the **Print Selection** dialogue box displays a tab for each family member whose file is currently open to permit printing returns for the whole family at once.

**File Properties**

View the **File Properties** details for all family files open together and listed in the **Window** menu.

**Deactivate Family Files**

To deactivate the family file-handling features, clear the checkbox **Allow family linking** under **Options > Module > T1/TP1 > General > Calculation options**.

# Using S3 Principal Residence Form in ProFile

Starting with the 2017 tax year, preparers must complete forms T2091 and/or T1255 for each real estate property disposed of by taxpayers in the year, including their principal residence.

In case of multiple properties disposed of by the taxpayer in the year, complete forms T2091 and/or T1255 for each property.

**How are the updated and new forms managed?**

The preparer completes the Schedule 3 form and S3 Principal Residence Details Form.

The preparer completes the new T2091 and/or T1255 form and sends a copy to the client for their signature. Clients sign the new form and return it to the preparer.

The T1255 and T2091 forms each contain some data that transmits to CRA.

Complete the TP274 form if the client is a resident of Quebec.

**Can a preparer enter data directly into the new T1255 or T2091 forms?**

Data in the Description of property sections of the new T1255 and T2091 forms flows from the client information entered on the S3 Principal Residence Details form. Enter any remaining required data on the new forms manually.

**Is it necessary to retain the T1255 or T2091 forms?**

A signed copy of Form T2091 - Designation of a Property as a Principal Residence by an Individual (or Form T1255 for deceased taxpayers) must be kept by the taxpayer in the case the CRA asks for it.

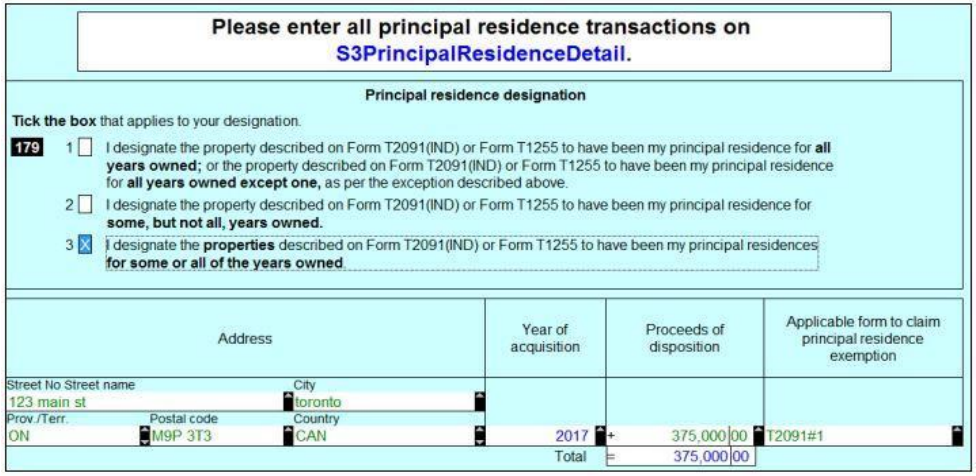
# Using S3 Principal Residence Form in ProFile, Continued

**Undertaking the Workflow:**

1. Complete the individual T1 **Info** pages for the residence owner and spouse (if applicable).
2. Open the **Schedule 3** form.
3. Select an option under **Line 179**.

**Note:** The following steps should be undertaken only for one spouse's return if the property is owned 50/50 between spouses.

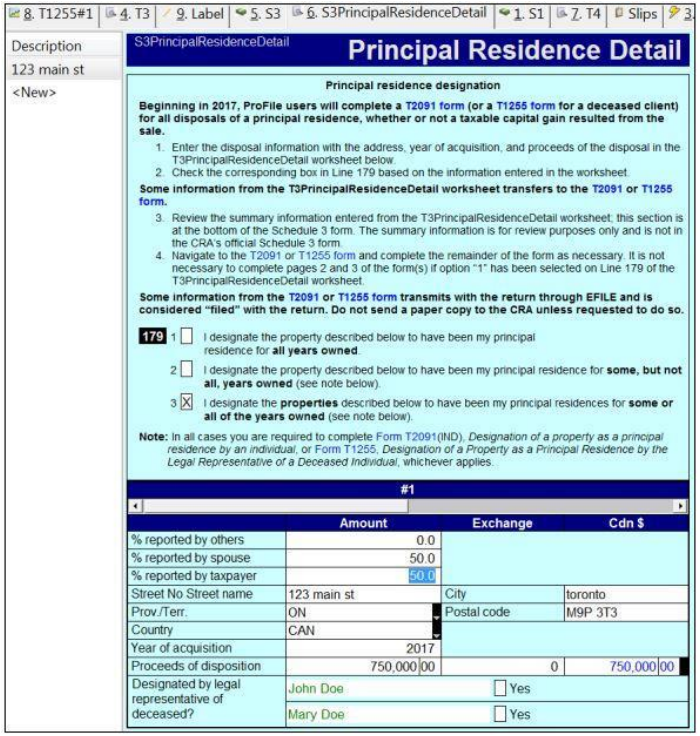
4. Click the **S3PrincipalResidenceDetail** link located above the section.


Please enter all principal residence transactions on
S3PrincipalResidenceDetail.
Principal residence designation
Tick the box that applies to your designation.
179
1 I designate the property described on Form T2091(IND) or Form T1255 to have been my principal residence for all years owned; or the property described on Form T2091(IND) or Form T1255 to have been my principal residence for all years owned except one, as per the exception described above.
2 I designate the property described on Form T2091(IND) or Form T1255 to have been my principal residence for some, but not all, years owned.
3 X I designate the properties described on Form T2091(IND) or Form T1255 to have been my principal residences for some or all of the years owned.
Address
Year of acquisition
Proceeds of disposition
Applicable form to claim principal residence exemption
Street No Street name
123 main st
City
toronto
Prov./Terr.
ON
Postal code
M9P 3T3
Country
CAN
2017
375,000 00
T2091#1
Total
375,000 00

The **S3 Principal Residence Detail** form opens.

**Note:** Each property that is disposed of automatically links to a T2091 form. Each property disposed of by the designated legal representative of a deceased taxpayer automatically links to a T1255 form.

5. Complete the **S3 Principal Residence Detail** form as required; note that the section **Designated by legal representative of deceased?** is automatically populated by the names of the residence owner and spouse (if applicable).


8. T1255#1
4. T3
9. Label
5. S3
6. S3PrincipalResidenceDetail
1. S1
7. T4
Slips
Description
123 main st
<New>
S3PrincipalResidenceDetail
Principal Residence Detail
Principal residence designation
Beginning in 2017, ProFile users will complete a T2091 form (or a T1255 form for a deceased client) for all disposals of a principal residence, whether or not a taxable capital gain resulted from the sale.
1. Enter the disposal information with the address, year of acquisition, and proceeds of the disposal in the T3PrincipalResidenceDetail worksheet below.
2. Check the corresponding box in Line 179 based on the information entered in the worksheet.
Some information from the T3PrincipalResidenceDetail worksheet transfers to the T2091 or T1255 form.
3. Review the summary information entered from the T3PrincipalResidenceDetail worksheet; this section is at the bottom of the Schedule 3 form. The summary information is for review purposes only and is not in the CRA's official Schedule 3 form.
4. Navigate to the T2091 or T1255 form and complete the remainder of the form as necessary. It is not necessary to complete pages 2 and 3 of the form(s) if option "1" has been selected on Line 179 of the T3PrincipalResidenceDetail worksheet.
Some information from the T2091 or T1255 form transmits with the return through EFILE and is considered "filed" with the return. Do not send a paper copy to the CRA unless requested to do so.
179
1 I designate the property described below to have been my principal residence for all years owned.
2 I designate the property described below to have been my principal residence for some, but not all, years owned (see note below).
3 X I designate the properties described below to have been my principal residences for some or all of the years owned (see note below).
Note: In all cases you are required to complete Form T2091(IND), Designation of a property as a principal residence by an individual, or Form T1255, Designation of a Property as a Principal Residence by the Legal Representative of a Deceased Individual, whichever applies.
#1
Amount
Exchange
Cdn $
% reported by others
0.0
% reported by spouse
50.0
% reported by taxpayer
50.0
Street No Street name
123 main st
City
toronto
Prov./Terr.
ON
Postal code
M9P 3T3
Country
CAN
Year of acquisition
2017
Proceeds of disposition
750,000 00
0
750,000 00
Designated by legal representative of deceased?
John Doe
Yes
Mary Doe
Yes

# Using S3 Principal Residence Form in ProFile, Continued

If the **Designated by legal representative of deceased?** option is not selected, the **Description of property** section of the **T2091** form populates.

If the **Designated by legal representative of deceased?** option is selected, the **Description of property** section of the **T1255** form populates.

**Completing the T2091 and/or T1255 Form:**

If the residence was owned 100% by an individual in the relationship, the non-owner spouse does not complete a T2091 or T1255 form.

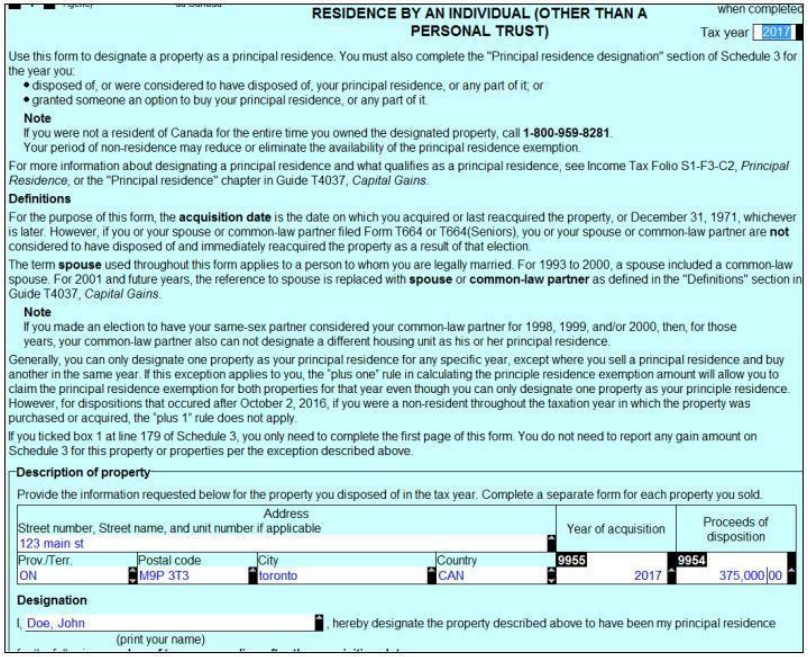
If the residence was owned in a 50/50 split, a T2091 or T1255 form must be completed for each spouse as follows:

- If option **1** in **Line 179 of Schedule 3** was selected, complete only the first page elements of the T2091 form that were not automatically calculated. If options **2** or **3** in **Line 179 of Schedule 3** were selected, it is necessary to complete the remaining elements of the form applicable to the specific situation, or:

- If option **1** in **Line 179 of Schedule 3** was selected, complete only the first page elements of the T1255 form that were not automatically calculated. If options **2** or **3** in **Line 179 of Schedule 3** were selected, it is necessary to complete the remaining elements of the form applicable to the specific situation.

**Related Articles**

Review the support article for additional details.



RESIDENCE BY AN INDIVIDUAL (OTHER THAN A PERSONAL TRUST)

when completed

Tax year 2017

Use this form to designate a property as a principal residence. You must also complete the "Principal residence designation" section of Schedule 3 for the year you:

- disposed of, or were considered to have disposed of, your principal residence, or any part of it; or
- granted someone an option to buy your principal residence, or any part of it.

**Note**

If you were not a resident of Canada for the entire time you owned the designated property, call **1-800-959-8281**. Your period of non-residence may reduce or eliminate the availability of the principal residence exemption.

For more information about designating a principal residence and what qualifies as a principal residence, see Income Tax Folio S1-F3-C2, *Principal Residence*, or the "Principal residence" chapter in Guide T4037, *Capital Gains*.

**Definitions**

For the purpose of this form, the **acquisition date** is the date on which you acquired or last reacquired the property, or December 31, 1971, whichever is later. However, if you or your spouse or common-law partner filed Form T664 or T664(Seniors), you or your spouse or common-law partner are **not** considered to have disposed of and immediately reacquired the property as a result of that election.

The term **spouse** used throughout this form applies to a person to whom you are legally married. For 1993 to 2000, a spouse included a common-law spouse. For 2001 and future years, the reference to spouse is replaced with **spouse** or **common-law partner** as defined in the "Definitions" section in Guide T4037, *Capital Gains*.

**Note**

If you made an election to have your same-sex partner considered your common-law partner for 1998, 1999, and/or 2000, then, for those years, your common-law partner also can not designate a different housing unit as his or her principal residence.

Generally, you can only designate one property as your principal residence for any specific year, except where you sell a principal residence and buy another in the same year. If this exception applies to you, the "plus one" rule in calculating the principle residence exemption amount will allow you to claim the principal residence exemption for both properties for that year even though you can only designate one property as your principle residence. However, for dispositions that occured after October 2, 2016, if you were a non-resident throughout the taxation year in which the property was purchased or acquired, the "plus 1" rule does not apply.

If you ticked box 1 at line 179 of Schedule 3, you only need to complete the first page of this form. You do not need to report any gain amount on Schedule 3 for this property or properties per the exception described above.

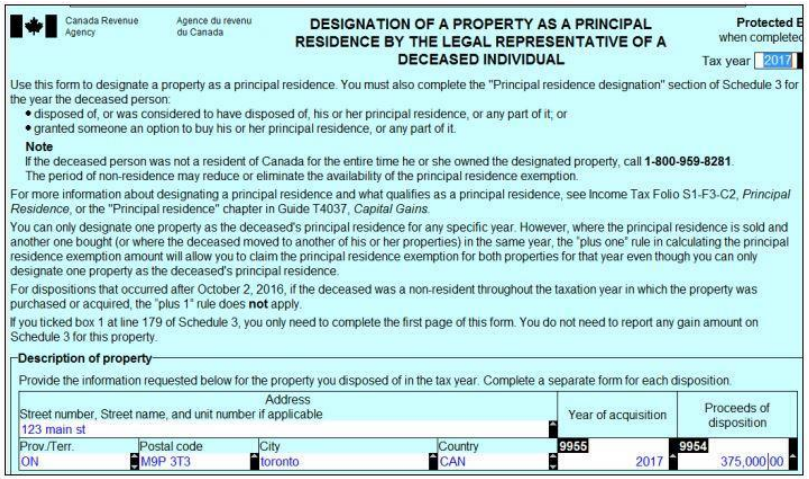
**Description of property**

Provide the information requested below for the property you disposed of in the tax year. Complete a separate form for each property you sold.

| Address: Street number, Street name, and unit number if applicable | Prov./Terr. | Postal code | City | Country | Year of acquisition | Proceeds of disposition |
|---|---|---|---|---|---|---|
| 123 main st | ON | M9P 3T3 | toronto | CAN | 9955 2017 | 9954 375,000 00 |

**Designation**

I, Doe, John (print your name), hereby designate the property described above to have been my principal residence



Canada Revenue Agency / Agence du revenu du Canada

DESIGNATION OF A PROPERTY AS A PRINCIPAL RESIDENCE BY THE LEGAL REPRESENTATIVE OF A DECEASED INDIVIDUAL

Protected B when completed

Tax year 2017

Use this form to designate a property as a principal residence. You must also complete the "Principal residence designation" section of Schedule 3 for the year the deceased person:

- disposed of, or was considered to have disposed of, his or her principal residence, or any part of it; or
- granted someone an option to buy his or her principal residence, or any part of it.

**Note**

If the deceased person was not a resident of Canada for the entire time he or she owned the designated property, call **1-800-959-8281**. The period of non-residence may reduce or eliminate the availability of the principal residence exemption.

For more information about designating a principal residence and what qualifies as a principal residence, see Income Tax Folio S1-F3-C2, *Principal Residence*, or the "Principal residence" chapter in Guide T4037, *Capital Gains*.

You can only designate one property as the deceased's principal residence for any specific year. However, where the principal residence is sold and another one bought (or where the deceased moved to another of his or her properties) in the same year, the "plus one" rule in calculating the principal residence exemption amount will allow you to claim the principal residence exemption for both properties for that year even though you can only designate one property as the deceased's principal residence.

For dispositions that occurred after October 2, 2016, if the deceased was a non-resident throughout the taxation year in which the property was purchased or acquired, the "plus 1" rule does **not** apply.

If you ticked box 1 at line 179 of Schedule 3, you only need to complete the first page of this form. You do not need to report any gain amount on Schedule 3 for this property.

**Description of property**

Provide the information requested below for the property you disposed of in the tax year. Complete a separate form for each disposition.

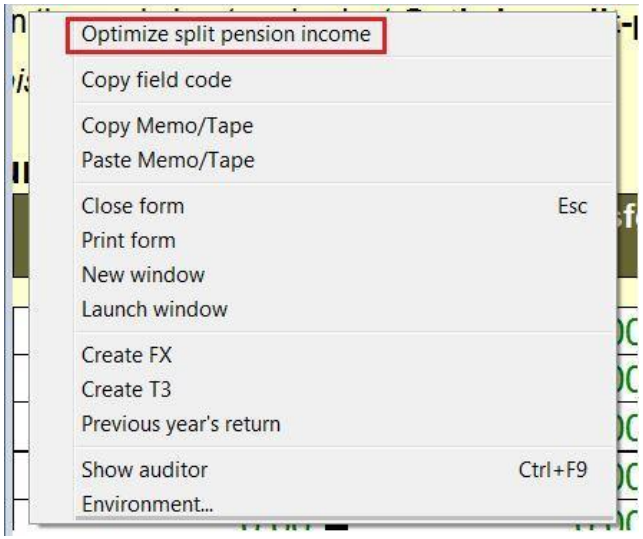
| Address: Street number, Street name, and unit number if applicable | Prov./Terr. | Postal code | City | Country | Year of acquisition | Proceeds of disposition |
|---|---|---|---|---|---|---|
| 123 main st | ON | M9P 3T3 | toronto | CAN | 9955 2017 | 9954 375,000 00 |

# Using Pension Split Optimization for T1 in ProFile

Canadian residents who received eligible pension income during the taxation year may be able to allocate up to half of their eligible income to their spouse (or common-law partner) for income tax purposes.

**Completing T1032 form:**

1. Open form **T032, Joint Election to Split Pension Income**.
2. Indicate at the top of form T1032 whether you are the **Pensioner** (transferring pension income to his/her spouse) or the **Pension Transferee** (receiving pension income from his/her spouse).
3. Enter the amount of the elected split pension on **Line E** of the form. Based on your Pensioner/Pension Transferee selection, the amounts will automatically flow to lines 210/116 of each of the spouse's returns.




**Utilizing the pension optimizer worksheet:**

1. Open the form **T1032OPT, Optimize – Split-pension income**.
2. To view the amount that ProFile recommends that the taxpayer transfer to his/her spouse or common law partner, right-click on the worksheet and select the **Optimize split-pension income** option.

**Utilizing scenarios in the Calculator section:**

1. Open the form **T1032OPT, Optimize – Split-pension income**.
2. Enter the amount of pension income to be split in the **Elected split-pension amount** box under **Scenario # 1**.
3. Press **Enter**. The calculator displays the **Total Payable and Balance Owing** for each individual, as well as combined totals for the couple.

**Related Articles**

Review the pension-splitting support article to learn more.

# Using Business Statements for T1 in ProFile

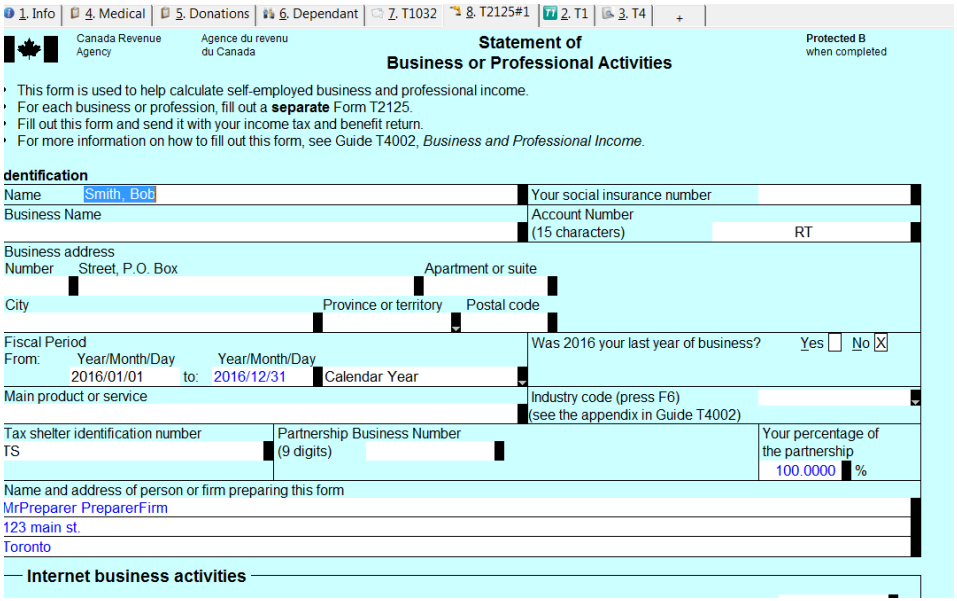
There are multiple business statements in ProFile, including:

- T2125 - Statement of Business or Professional Activities
- T776 - Statement of Real Estate Rentals
- T2042 - Statement of Farming Activities
- T2121 - Statement of Fishing Activities
- T1163 & T1273 - AgriStability

Each statement has their own set of forms such as the asset, CCA, and summary forms.

Amounts from certain slips are transferable to a business statement. It gives the option to transfer on the slip.

These statements are multi-copy forms; in order to create a secondary statement, select the **New Form** option from the **Form** drop-down menu in the top toolbar menu.

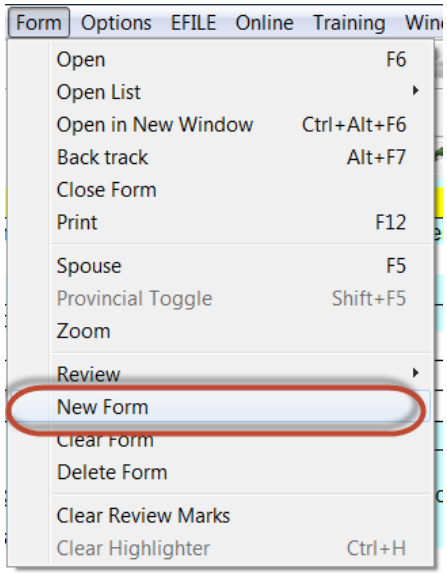



### Deleting business statement sets (T4slip)

If you delete any form in a business statement set, ProFile deletes all the related forms in the same set. ProFile automatically selects for printing any of the business statement forms that are used. Unused forms in a set have no impact on a tax return filing.

To clear a particular form in the set, open the form in the **Edit** window and select the **Clear Form** option from the **Form** drop-down menu in the top toolbar menu.

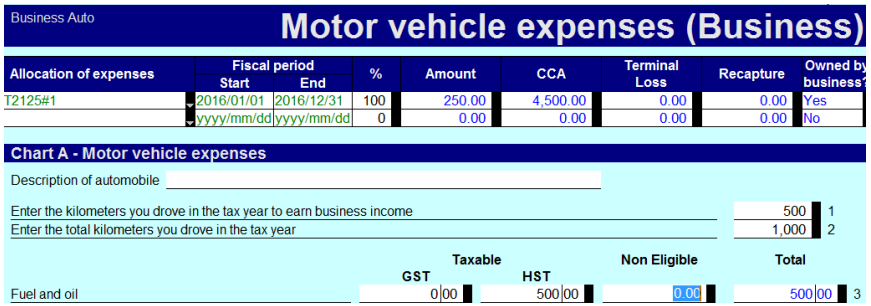
This option does not impact other forms in the same set.




### Related Articles

Review the **business statement** and **Asset details** entries in ProFile's **Help** feature for additional information.

# Adding Motor Vehicles for T1 in ProFile


Business Auto

Motor vehicle expenses (Business)

| Allocation of expenses | Fiscal period Start | Fiscal period End | % | Amount | CCA | Terminal Loss | Recapture | Owned by business? |
|---|---|---|---|---|---|---|---|---|
| T2125#1 | 2016/01/01 | 2016/12/31 | 100 | 250.00 | 4,500.00 | 0.00 | 0.00 | Yes |
| | yyyy/mm/dd | yyyy/mm/dd | 0 | 0.00 | 0.00 | 0.00 | 0.00 | No |

Chart A - Motor vehicle expenses

Description of automobile

| | | | |
|---|---|---|---|
| Enter the kilometers you drove in the tax year to earn business income | | 500 | 1 |
| Enter the total kilometers you drove in the tax year | | 1,000 | 2 |

| | Taxable GST | Taxable HST | Non Eligible | Total | |
|---|---|---|---|---|---|
| Fuel and oil | 0 00 | 500 00 | 0.00 | 500 00 | 3 |

The Motor vehicle expenses (Business) worksheet lists motor vehicle expenses used for business purposes, related to the T2125, T2121, T2042 and Quebec business statements.

From the Allocation of expenses drop-down menu, select your business statement (if you have not yet opened a business statement, the drop down list will be empty).

Data entered on the Business Auto form flows to the selected business statement(s).

In the case of the T2125, T2121 and T2042 business statements, ProFile transfers automobile expenses to different areas on the statements depending on the taxpayer's percentage of ownership of the business:

- If the business is a sole proprietorship (% ownership = 100%), then the automobile expenses are transferred to the expense section of the business statement (line 9281 or 9819, depending on the business statement).
- If the business is a partnership, the expenses are transferred to line 9943, Other amounts deductible from your share of net partnership income (loss).

As you complete the Business Auto worksheet, ProFile automatically transfers the required information to the related Quebec business auto form (for example, T**P80Auto**, **TP1FishingAuto**).

### Capital Cost Allowance (CCA)

Chart C of the Business Auto worksheet lets you calculate the Capital Cost Allowance (CCA). CCA amounts are transferred to the business statement's CCASummary or the CCA (assets owned by partner) table of the relevant business statement, depending on whether or not the vehicle is owned by the business. This is specified in the Owned by business? column of the Allocation of expenses table. For vehicles owned by a partner in a business, ensure that the Owned by business? column is set to No for the related business statement.

### Sharing automobile expenses between spouses

ProFile does not automatically share the details of motor vehicle expenses with the spouse's return. If both spouses have expenses related to the business use of an automobile, they will each have to create their own Business Auto form.

### Related Articles

Review the support article to learn more about CCA for motor vehicles.

# Adding Assets and CCA for T1 in ProFile

Asset details forms are part of the business-statement set. For each business statement, ProFile creates a corresponding asset details and asset list form. For example, when creating a T2125#1 form, ProFile creates the corresponding T2125Asset#1 and T2125AssetList#1 forms.

Use asset details and asset list list forms to track business and rental assets. Enter asset information on the asset details form. ProFile automatically transfers this information to the corresponding asset list form. The asset list form displays all assets in a single table that you can print.

**Note:** It is not possible to print the asset list form.

**Entering asset information:**

1. Complete a separate entry for each asset.
2. A list of assets appears in the panel on the left of the **asset details** form. Click on one of these items to display the asset details for a particular asset.
3. Click **New** to enter information in a blank column. ProFile automatically numbers each asset as entered on the information and creates a blank entry for the next asset. Complete a separate entry for each asset.
4. Enter details for each asset under the Federal/Quebec headings. ProFile automatically calculates the net cost or proceeds and transfers the amount to the **CCA form** to calculate the capital cost allowance (CCA), recapture, or terminal loss.

T2125CCA

**T2125 CCA**

**Please enter addition and disposition details on T2125Asset.**

| | | CCA Item #1 |
|---|---|---|
| Class | | |
| Terminal loss? | | No |
| Description | | |
| Class 10 or 10.1 limited by the number Km? | | No |
| Kilometres travelled in carrying on your activity | | 0 |
| Total kilometres | | 0 |
| Acquisition date / Start of lease | | yyyy/mm/dd |
| Expiry date | | yyyy/mm/dd |
| Capital cost | | 0.00 |
| Number of 12 month periods | | 0 |
| Annual CCA | | 0.00 |
| CCA claim in prior years | | 0.00 |
| Undepreciated capital cost (UCC) - start of year | | 0.00 |
| Cost of additions | Normal additions | 0.00 |
| | Additions exempt from 50% rule | 0.00 |
| | Total additions | 0.00 |
| Proceeds of dispositions | | 0.00 |
| Adjustments | Prior year ITC | 0.00 |
| | Other | 0.00 |
| | Total | 0.00 |
| Subtotal | | 0.00 |
| Adjustment for additions (50% rule) | | 0.00 |
| Base amount for CCA | | 0.00 |
| CCA Rate | | 0.00 |
| CCA for the year, personal use portion | | 0.00 |
| CCA for the year | | 0.00 |
| Recapture of CCA | | 0.00 |
| Terminal loss | | 0.00 |
| UCC Reduction | | 0.00 |
| UCC - end of year | | 0.00 |

**Capital Cost Allowance (CCA) form**

Capital Cost Allowance (CCA) forms and summaries are part of the business statement set. For each business statement, ProFile creates a corresponding CCA and CCASummary form. For example, when creating a T2125#1, ProFile creates the corresponding T2125CCA#1 and T2125CCASummary#1 forms.

# Using the Employment Expenses form for T1 in ProFile

Use form T777 to calculate allowable employment expenses.

There are four forms related to employment expenses:

- T777
- T777Details
- T777Other
- T777Auto

Enter employment expenses for commission and non-commission employees on T777Details.

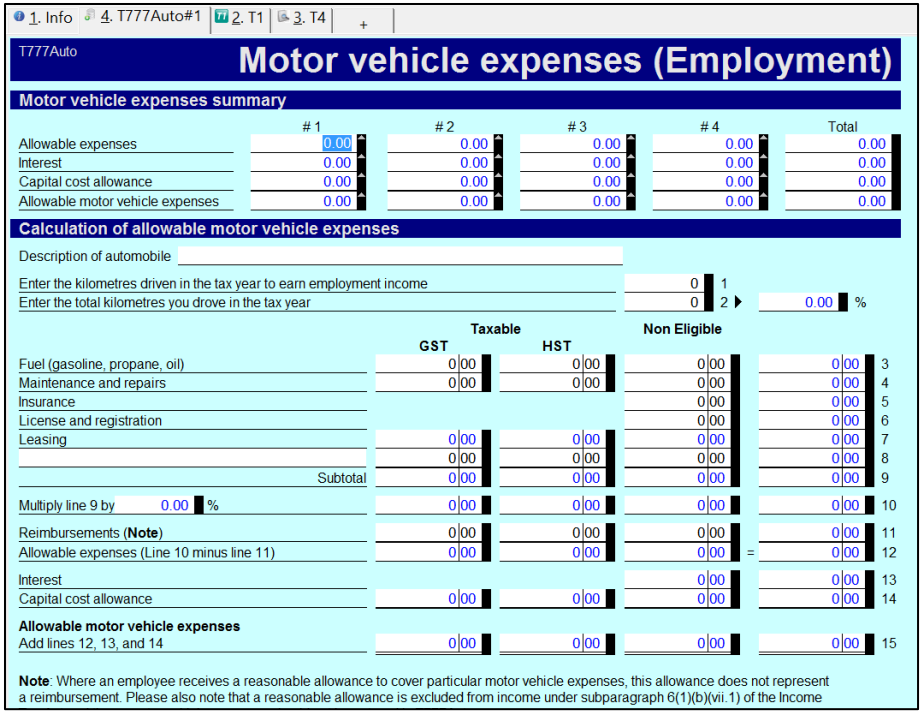
Enter expenses for musicians, forestry workers and apprentice mechanics on T777Other.

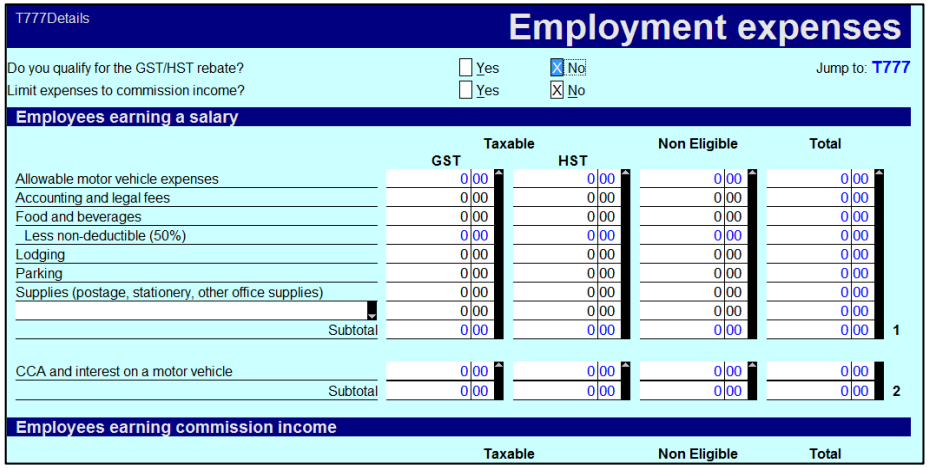
Use form T777Auto to calculate automobile expenses related to earning employment income.

**T777Auto#: Motor vehicle expenses:**

Use this form to calculate automobile expenses related to earning employment income.

1. Create a new T777Auto worksheet for each automobile.
2. Complete the expense details for the automobile.
3. Right-click on the form and select **New form** from the context-sensitive menu.

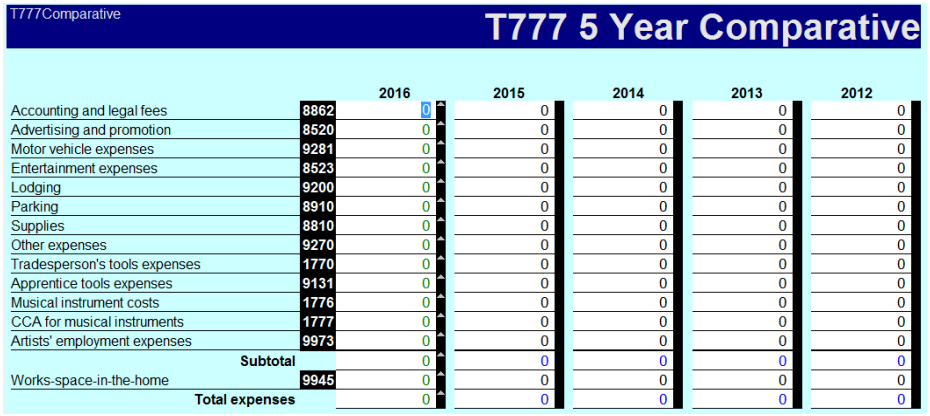


# Using Comparative Summary for T1 in ProFile

ProFile provides summary forms that present the tax return data in different ways. These include:

- **Summary - Tax Summary (Federal):** This form displays all the non-zero line items of a single taxpayer's T1 return (each field that contains data in the return).
- **T1Summary - Tax Return Summary, TP1Summary - Tax Summary (Québec):** These forms display major items from the taxpayer's return
- **5Year - 5 Year Tax Summary (Federal), TP15Year - TP1 5 Year Tax summary (Québec):** This form displays the major items for a single taxpayer's last five years of tax returns.
- **Comparative - Comparative Tax Summary (Federal), TP1Comparative - TP1 Comparative tax summary:** This form compares the major items from this year's tax return to last year's tax return for a single taxpayer. If the return carried forward using Profile, last year's amounts appear automatically on the comparative summary.
- **NRTC - Comparative NRTC Summary:** This form compares the non-refundable tax credits on the federal and provincial tax returns
- **T1Review - T1 Review, TP1Review - TP1 Review:** Similar to the Comparative Tax Summary, this form compares the major items from this year's tax return to last year's tax return for a single taxpayer, with a special focus on review. The form uses the variance thresholds specified under **Options** -> **Module…** -> **T1/TP1 Review** to highlight significant changes between current and prior year returns. It is also possible to adjust the variance threshold in the Review preferences section of the form. ProFile calculates the differences and displays them on the T1/TP1 Review tab in dollar and/or percentage amounts.




**Five-year comparative summaries** are part of the business-statement set. For each business statement, ProFile creates a corresponding five-year comparative summary form. For example, if creating a T2125#1 form, ProFile creates the T2125Comparative#1 form. This form is used to compare up to five years of business statement information.

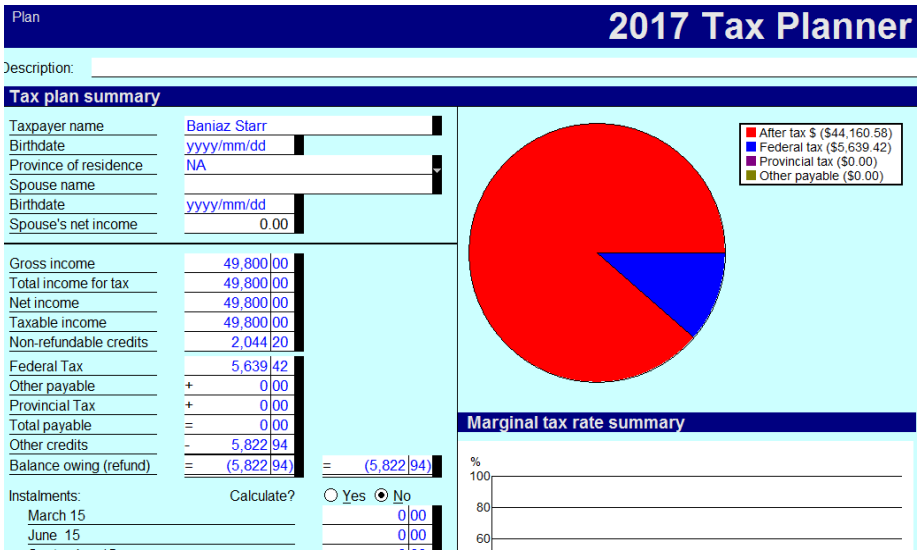
ProFile automatically carries forward previous-year business statement information from the previous year to this form. Enter any additional information directly in the summary.

If creating a new return, rather than undertaking the carry forward of an existing return, enter the prior year information directly on the comparative summary. ProFile carry forwards this information in the following year.

# Using Tax Planner for T1 in ProFile

The tax planner in ProFile prepares a projection of the taxpayer's position for the **next taxation year**.

Tax Planner is an unlimited form, so as many different scenarios as required can be created for a single T1 file.




**Creating a T1 tax plan:**

1. Enter the term **tax plan** in the ProFile search bar in the top toolbar.
2. Select the **PLAN: Tax planner** option from the search results; the tax planner displays.
3. Right-click on a form field and select the **New form** option from the menu.
4. Enter a description for the scenario in the **Description** field at the top of the form. This description displays in the **Form Explorer** to distinguish between the different scenarios created.

**Note:** When creating a new plan, ProFile creates new T1 plans for the client and spouse, all in the same numbered set.

**Transferring data from the current year's tax return:**

To save time entering data on a new plan, you can transfer amounts from the current year's tax return to get you started.

1. Open a completed T1 client file.
2. Open the tax planner from the **Client** category of the **Form Explorer**.
3. Right-click on a form field and select the **Copy T1 return** option from the menu; the return's data imports into the tax planner.
4. Change any amounts to reflect the client's new projections for the year.

# Using a Motor Vehicle Expenses Form for T1 in ProFile

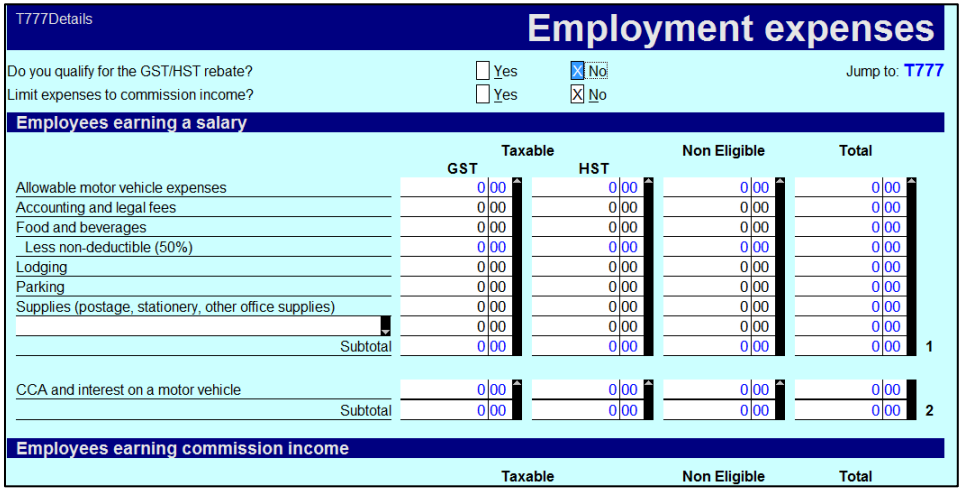
Form T777 calculates allowable employment expenses.

**Note:** This applies for T7777 vehicles **only**.

Enter the term **T777** into the ProFile search bar in the top toolbar menu and select the appropriate result.

There are four forms related to employment expenses:

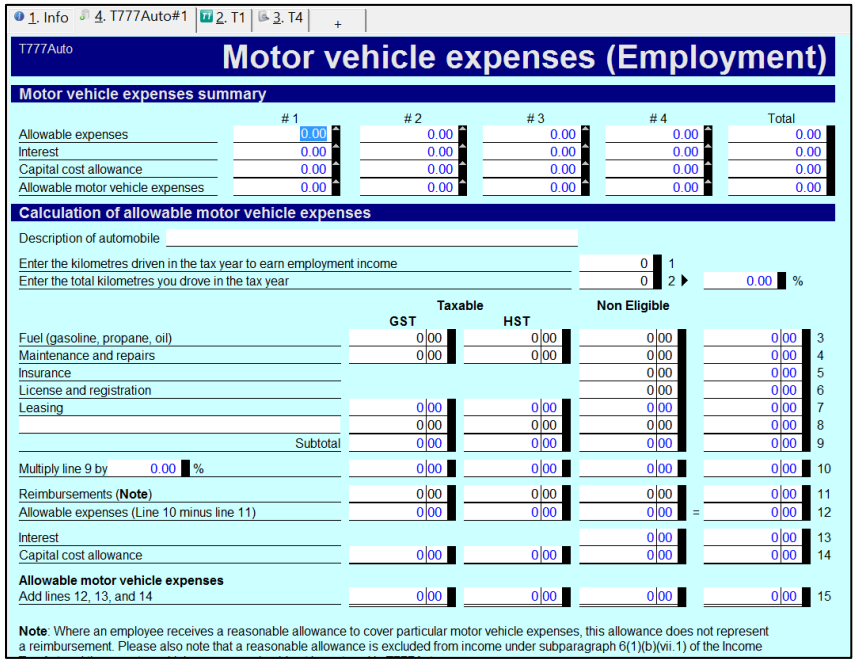
- **T777:** Enter employment expenses
- **T777Details:** Enter employment expenses for commission and non-commission employees
- **T777Other:** Enter expenses for musicians, forestry workers and apprentice mechanics
- **T777Auto:** Calculate automobile expenses related to earning employment income




**T777Auto#: Motor vehicle expenses:**

This form calculates automobile expenses related to earning employment income.

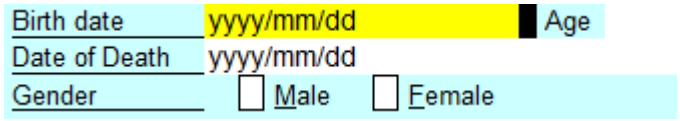
1. Create a new **T777Auto worksheet** for each automobile.
2. Complete the expense details for the automobile. Any number of copies of the form may be created. Right-click on the form and select the **New Form** option from the menu.



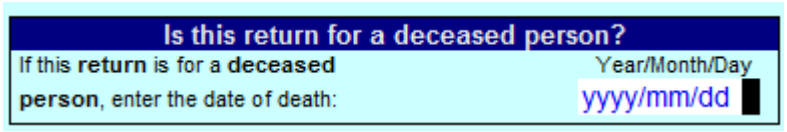
# Filing a T1 for a Deceased Taxpayer in ProFile

**Complete a return for a deceased taxpayer who is single** :

1. Create a new T1 return in ProFile.
2. Navigate to the **Info** sheet.
3. Enter the date of the client's death in the **Date of Death** field under the **Taxpayer personal information** section.



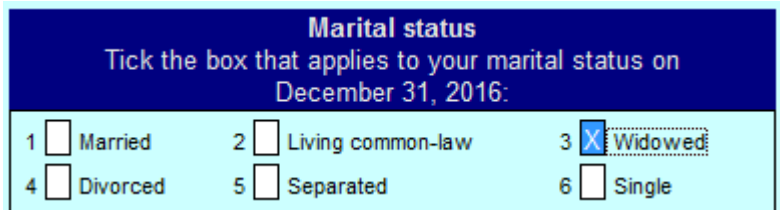

The date of the client's death in the **Is this return for a deceased person?** section of the T1 sheet updates automatically.


Is this return for a deceased person?
If this return is for a deceased person, enter the date of death:
Year/Month/Day
yyyy/mm/dd

If the deceased taxpayer is married, the status of the individual's spouse changes automatically to **Widowed** on the spouse's form.

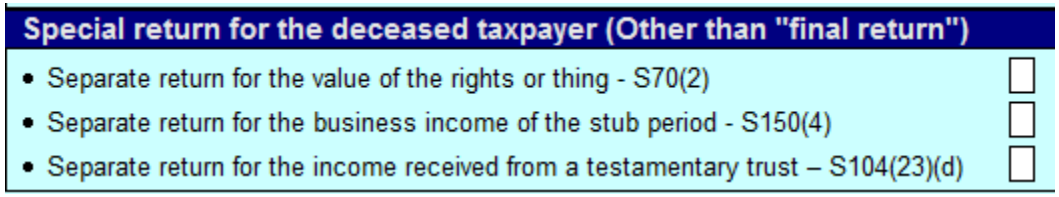
**Completing Special return for deceased taxpayer:**

1. Enter the date of the client's death in the **Date of Death** field under the **Taxpayer personal information** section.
2. Scroll down the **Info** sheet to the **Special return for the deceased taxpayer (Other than "final return")** section.
3. Review the options in the section and select one if applicable.




**Carrying forward a coupled deceased return**

When carrying forward a coupled file in which a spouse files a deceased return for the previous taxation year, ProFile automatically carries forward only the return for the surviving taxpayer.


Special return for the deceased taxpayer (Other than "final return")
• Separate return for the value of the rights or thing - S70(2)
• Separate return for the business income of the stub period - S150(4)
• Separate return for the income received from a testamentary trust – S104(23)(d)

# Managing T2 Returns in ProFile

# Overview of T2 Module in ProFile

A T2 is the federal tax return for incorporated businesses (also called corporations). An incorporated business must complete a T2 return each year, even if there is no tax payable.

The form must be filed within six months of the end of each corporation's fiscal year.

The CRA requires that any T2 returns being filed electronically must be filed via the EFILE service.

**Required information and material for T2 returns**

For the best-possible experience, assemble the following information and materials prior to undertaking the T2 return:

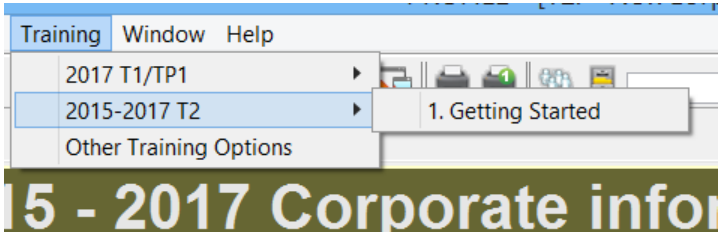
- Prior-year financial statements and T2 return, if applicable
- Articles of incorporation
- List of product and services provided in percentages
- Obtain backup electronic copies of applicable bookkeeping (for example, QuickBooks, Simply accounting, MS Excel, etc.), trial balance sheet, income statement, general ledger, credit card and bank statements of the last month of the corporation year
- Corporate installment payments made during the year
- Copy of prior years' Notice of Assessment (NOA)
- Correspondence with any government relating to the corporation
- List of changes to the corporation from last year (for example, new director, shareholders, new assets, etc.)
- Business number of the corporation (review the incorporation documents or prior-year return)
- Address of corporation, including head office, mailing and location of books, if applicable (you can review the CRA My Account feature for this information)
- Fiscal year-end date of company
- Enter information and carry-forward the return in ProFile of the prior-year corporation return, if available
- Provide a signed business consent form to acquire access to the client’s business information through the CRA (support article)

# T2 Guide and In-Product Tutorial in ProFile

ProFile provides customers a T2 guide that includes a list of steps a user should understand in order to file a corporate return.

**Note:** The T2 guide covers basic steps for filing a T2 return, but does not provide any tax-related advice or opinion. ProFile recommends reviewing the CRA website, contacting the CRA tax inquiry line, or consulting an accredited CPA firm for information regarding current tax laws. ProFile also recommends having any return prepared or reviewed by a professional accountant before filing.

Click here to view the T2 Guide.




**In-product T2 tutorial**

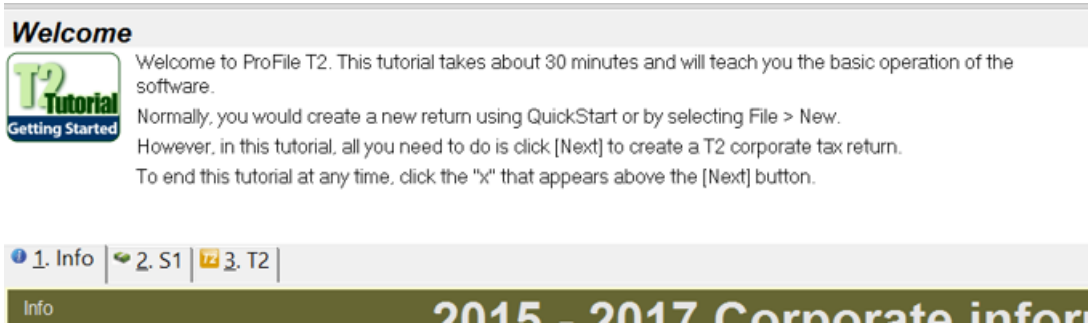
ProFile provides an in-product T2 tutorial that walks a user through the basic functions of completing and filing a corporate return.

**To access the tutorial:**

1. Open a T2 return.
2. Select the **1. Getting Started** option under the **Training > T2** drop-down menu in the top toolbar.

The T2 tutorial opens below the top toolbar.

3. Click the **Next** button to proceed through the tutorial.


Welcome
T2 Tutorial
Getting Started
Welcome to ProFile T2. This tutorial takes about 30 minutes and will teach you the basic operation of the software.
Normally, you would create a new return using QuickStart or by selecting File > New.
However, in this tutorial, all you need to do is click [Next] to create a T2 corporate tax return.
To end this tutorial at any time, click the "x" that appears above the [Next] button.
1. Info
2. S1
3. T2
Info

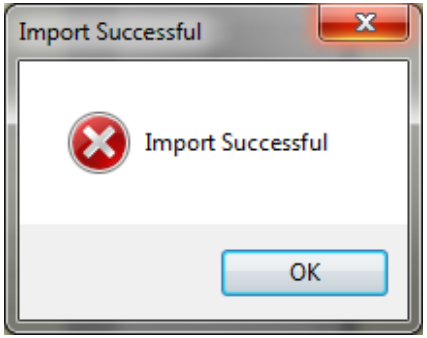
# Using GIFI Import from Caseware for T2 in ProFile

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.

**Importing GIFI from CaseWare to ProFile**

**In Caseware:**

1. Open Caseware.
2. Open the **Working Papers** client file from which to export.
3. Select the **GIFI** option from the **Export** menu; the **Export of Data to GIFI** dialogue box displays. Complete the fields of the dialogue box.
4. Click the **OK** button; the export processes and creates the GIFI file.




**In ProFile:**

1. Open a T2 return.
2. Select the **Import…** option from the **File** drop-down menu in the top toolbar.
3. Select the location where the Caseware-created GIFI file is stored.
4. Select the GIFI file; click the **Open** button.

**Note:** The **Import Successful** dialogue box displays an incorrect **X** icon. Click the **OK** button.

The GIFI information imports to the T2 return.

**Related Articles**

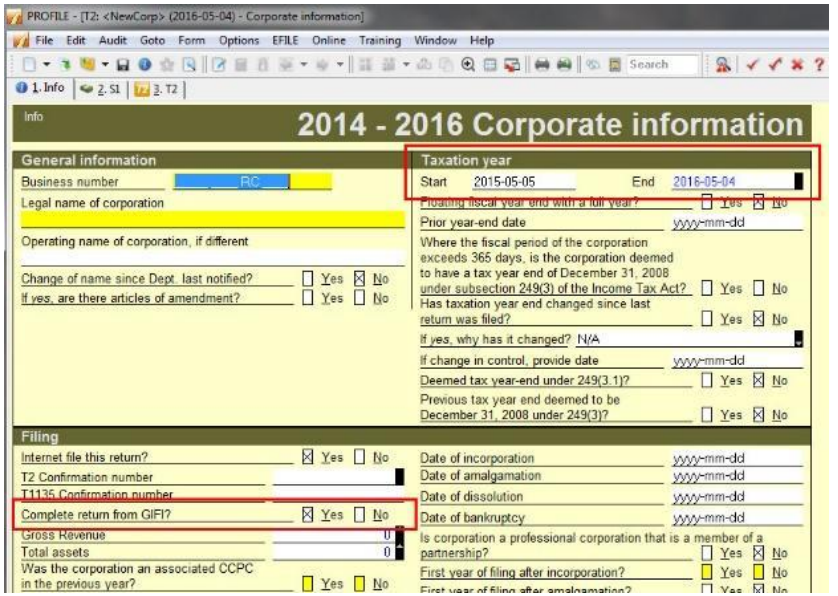
Review the ProFile article on GIFI import from QuickBooks Online (QBOA).

Review the ProFile article on GIFI import from QuickBooks desktop to ProFile.

Review the Caseware article on exporting GIFI data for imports.

# Using GIFI Import from QuickBooks Desktop for T2 in ProFile

**Note:** It is necessary to undertake QuickBooks integration prior to importing GIFI from QuickBooks Desktop. This guide includes a QuickBooks Integration section.

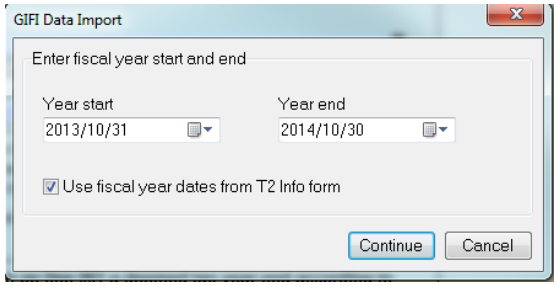

PROFILE - [T2: <NewCorp> (2016-05-04) - Corporate information]
File Edit Audit Goto Form Options EFILE Online Training Window Help
1. Info
2. S1
3. T2
Info
2014 - 2016 Corporate information
General information
Business number
Legal name of corporation
Operating name of corporation, if different
Change of name since Dept. last notified?
If yes, are there articles of amendment?
Taxation year
Start 2015-05-05
End 2016-05-04
Prior year-end date
Where the fiscal period of the corporation exceeds 365 days, is the corporation deemed to have a tax year end of December 31, 2008 under subsection 249(3) of the Income Tax Act?
Has taxation year end changed since last return was filed?
If yes, why has it changed? N/A
If change in control, provide date
Deemed tax year-end under 249(3.1)?
Previous tax year end deemed to be December 31, 2008 under 249(3)?
Filing
Internet file this return?
T2 Confirmation number
T1135 Confirmation number
Complete return from GIFI?
Gross Revenue
Total assets
Was the corporation an associated CCPC in the previous year?
Date of incorporation
Date of amalgamation
Date of dissolution
Date of bankruptcy
Is corporation a professional corporation that is a member of a partnership?
First year of filing after incorporation?

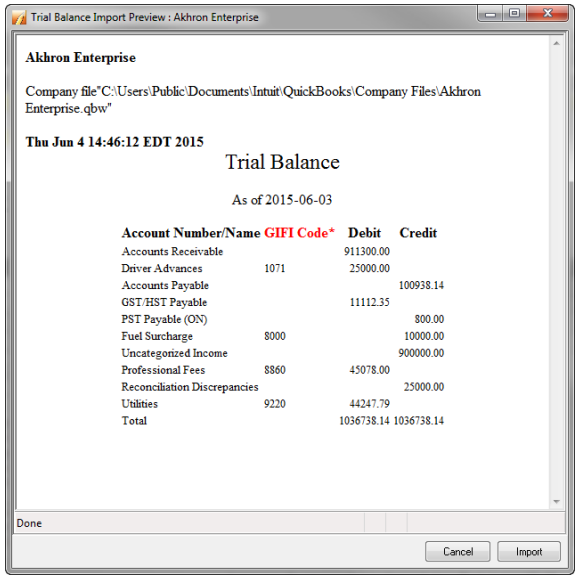
### About GIFI Import

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.

### Importing GIFI from QuickBooks desktop:

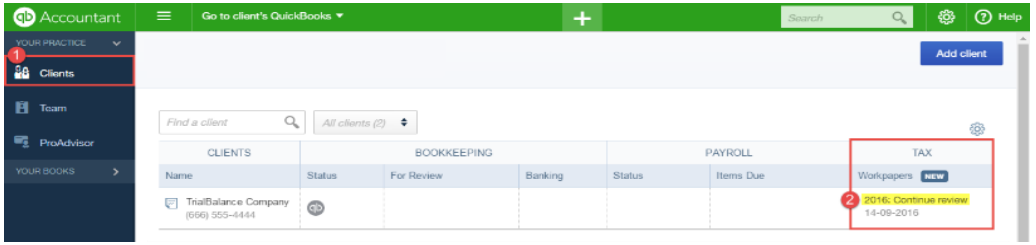
1. Open a T2 return in ProFile.
2. Ensure that the ProFile T2 taxation year matches the corresponding year entered in QuickBooks.
3. Select the **Yes** option for the question **Complete return from GIFI?** in the **Filing** section of the ProFile T2 return.
4. Select the **QuickBooks Desktop Import…** option from the **File** drop-down menu in the top toolbar.
5. Set the **Year start** and **Year end** values in the **GIFI Data Import** window.
6. Click the **Continue** button.
7. Review the amounts being imported from QuickBooks to ProFile.
8. If correct, click the **Import** button.

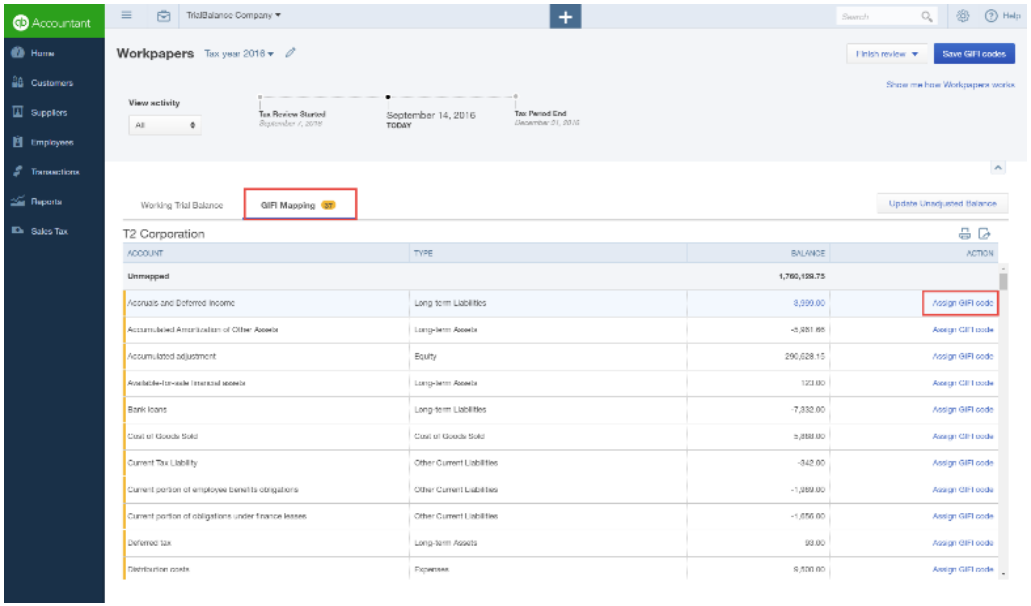


# Using GIFI Import from QBOA for T2 in ProFile

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.




**GIFI Import from QBOA:**

1. Log in to the QBOA Firm containing the data to export.
2. Click the hyperlink text under the **Workpapers** column, or, if logged into the client file, click here.
3. In QuickBooks navigate to the **Workpapers** section for the client's books.
4. Review the **Working Trial Balance** and the **GIFI Mapping** to ensure that all the work is completed. If there are any unassigned codes, these can be mapped under the GIFI mapping section. To assign GIFI Codes review the list and click **Assign GIFI Codes**.
5. Click **Save GIFI codes** at the top-right corner.

**In ProFile:**

1. Select the **QBOA Import…** option from the **File** drop-down menu in the top toolbar.
2. Navigate to the GIFI file to import.
3. Select the GIFI file and click the **OK** button.

The GIFI information imports.

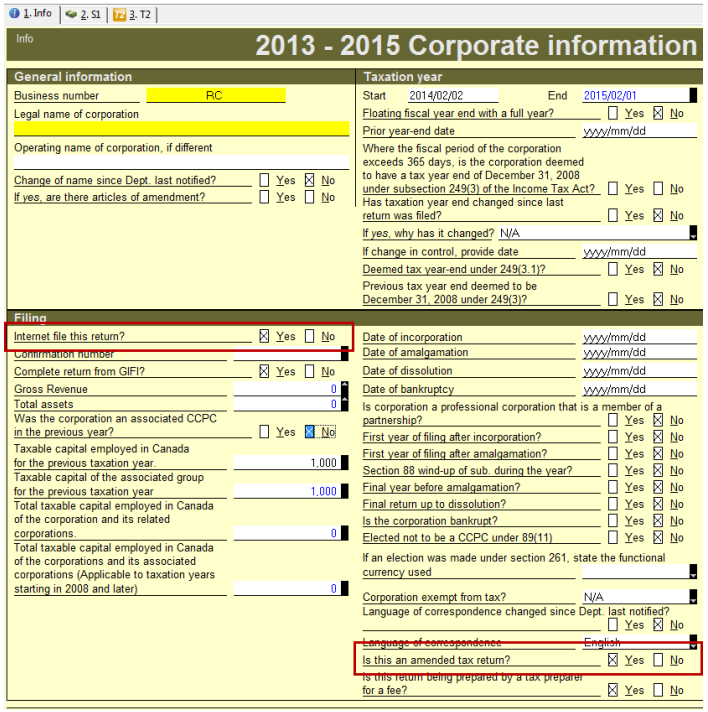
# Using Amendments for T2 in ProFile

T2 amendments are carried out when a new piece of information demands that the original T2 be amended to reflect the new data.

**Saving the original T2 return:**

ProFile strongly recommends that the file be renamed before amending the return. This ensures the original T2 is not lost in the process of being amended.

1. Open the T2 return that requires amendment.
2. Select the **Save As…** option from the **File** drop-down menu in the top toolbar.
3. Save the T2 return as **[Your Corp Name]_amended**.


1. Info
2. S1
3. T2
Info
2013 - 2015 Corporate information
General information
Business number
RC
Legal name of corporation
Operating name of corporation, if different
Change of name since Dept. last notified?
If yes, are there articles of amendment?
Taxation year
Start 2014/02/02
End 2015/02/01
Floating fiscal year end with a full year?
Prior year-end date
Where the fiscal period of the corporation exceeds 365 days, is the corporation deemed to have a tax year end of December 31, 2008 under subsection 249(3) of the Income Tax Act?
Has taxation year end changed since last return was filed?
If yes, why has it changed? N/A
If change in control, provide date
Deemed tax year-end under 249(3.1)?
Previous tax year end deemed to be December 31, 2008 under 249(3)?
Filing
Internet file this return?
Confirmation number
Complete return from GIFI?
Gross Revenue
Total assets
Was the corporation an associated CCPC in the previous year?
Taxable capital employed in Canada for the previous taxation year.
Taxable capital of the associated group for the previous taxation year
Total taxable capital employed in Canada of the corporation and its related corporations.
Total taxable capital employed in Canada of the corporations and its associated corporations (Applicable to taxation years starting in 2008 and later)
Date of incorporation
Date of amalgamation
Date of dissolution
Date of bankruptcy
Is corporation a professional corporation that is a member of a partnership?
First year of filing after incorporation?
First year of filing after amalgamation?
Section 88 wind-up of sub. during the year?
Final year before amalgamation?
Final return up to dissolution?
Is the corporation bankrupt?
Elected not to be a CCPC under 89(11)
If an election was made under section 261, state the functional currency used
Corporation exempt from tax? N/A
Language of correspondence changed since Dept. last notified?
Language of correspondence English
Is this an amended tax return?
Is this return being prepared by a tax preparer for a fee?

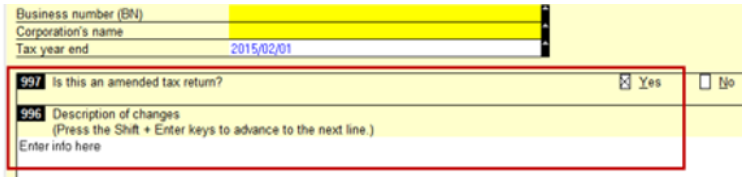
**Amending the corporate information page:**

1. Select the **Info** tab in the T2 return.
2. Set the following values in the **Filing** section:
   - **Is this an amended return?** is set to **Yes**
   - **Internet file this return?** is set to **Yes**
3. Select the **Yes** value on **line 997** of the **T2 Adjustment** worksheet.
4. Enter a description of the amendment in the field of **line 996**.

**Restrictions**

The following fields cannot be amended under this process; ProFile displays a warning message if an amendment is submitted regarding one of these fields. These fields must be amended via the CRA's website:

- Head office address change
- Mailing address change
- Location of books and records change
- Direct deposit information
- Language of correspondence



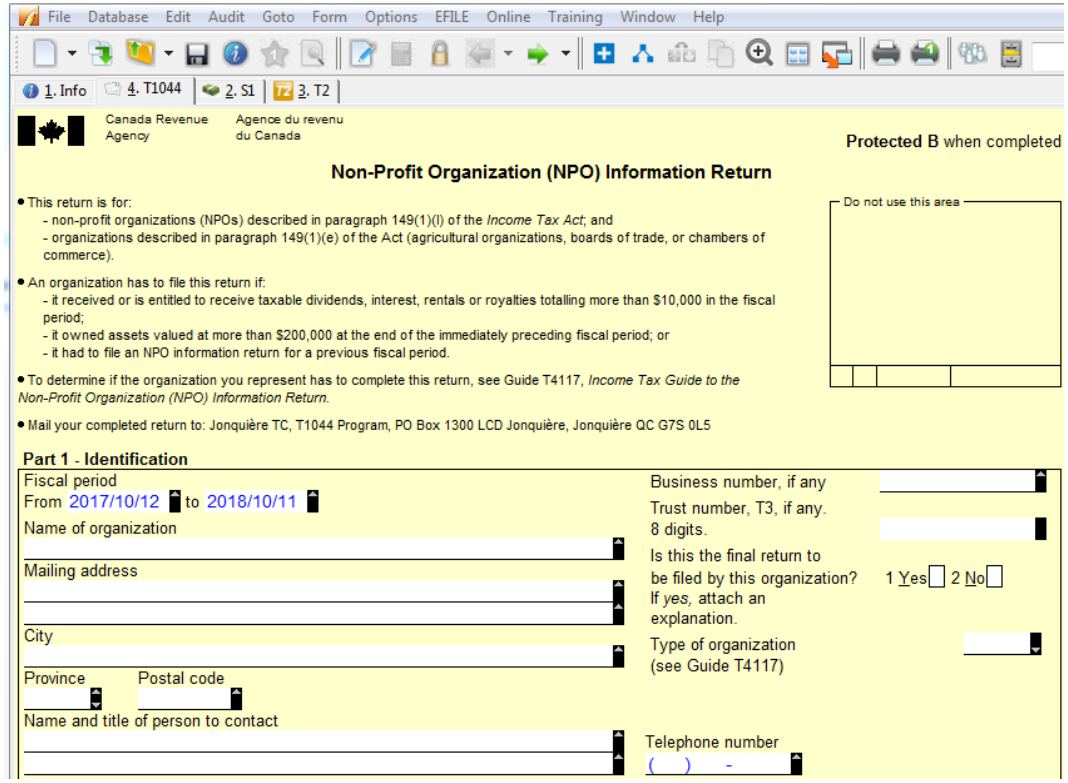

**Related Articles**

Review the support article for more information.

# Using Form T1044 in T2 module

Form T1044 Non-Profit Organization (NPO) Information Return is for non-profit organizations as described in paragraph 149(1)(I) of the Income Tax Act, and organization described in paragraph 149(1)(e) of the *Act*.

Search in ProFile for **T1044** to find the form.


File Database Edit Audit Goto Form Options EFILE Online Training Window Help
1. Info
4. T1044
2. S1
3. T2
Canada Revenue Agency
Agence du revenu du Canada
Protected B when completed
Non-Profit Organization (NPO) Information Return
This return is for:
- non-profit organizations (NPOs) described in paragraph 149(1)(l) of the Income Tax Act; and
- organizations described in paragraph 149(1)(e) of the Act (agricultural organizations, boards of trade, or chambers of commerce).
An organization has to file this return if:
- it received or is entitled to receive taxable dividends, interest, rentals or royalties totalling more than $10,000 in the fiscal period;
- it owned assets valued at more than $200,000 at the end of the immediately preceding fiscal period; or
- it had to file an NPO information return for a previous fiscal period.
To determine if the organization you represent has to complete this return, see Guide T4117, Income Tax Guide to the Non-Profit Organization (NPO) Information Return.
Mail your completed return to: Jonquière TC, T1044 Program, PO Box 1300 LCD Jonquière, Jonquière QC G7S 0L5
Do not use this area
Part 1 - Identification
Fiscal period
From 2017/10/12 to 2018/10/11
Name of organization
Mailing address
City
Province
Postal code
Name and title of person to contact
Business number, if any
Trust number, T3, if any. 8 digits.
Is this the final return to be filed by this organization? If yes, attach an explanation.
1 Yes 2 No
Type of organization (see Guide T4117)
Telephone number

# Using T1134 EFILE for T2 in ProFile

ProFile users can electronically file the T1134 - Information Return Relating to Controlled and Not-Controlled Foreign Affiliates for your client in the T2 module.

The T1134 return can undergo EFILE before or after filing the T2 return.

**EFILE the T1134 Return:**

1. Open the T1134 return undergoing EFILE.
2. Select the **EFILE the T1134** option from the **EFILE** drop-down menu in the top toolbar.
3. Click the **OK** button when presented with a request for confirmation.

**Note:** Select the **Do not show this warning again** option to avoid seeing the confirmation message in subsequent EFILE efforts.

4. Clear any audit messages before transmitting the form.

If the return transmits successfully, ProFile displays a confirmation number. Retain this number for your records.

If the return transmission is unsuccessful, ProFile displays the errors identified by the CRA. Correct any errors and resubmit the return.

**Amending a T1134 Return for a Supplementary Deletion:**

**Note:** An amended return is only filed electronically if the original return was filed electronically. ProFile users can electronically amend a T1134 return that underwent EFILE and needs to be deleted.

1. Open the Supplementary to be deleted.
2. Select the **Delete Form** option from the **Form** drop-down menu.
3. Select the reason for deleting the Supplementary from the drop-down menu:
    - Duplicate
    - Filed in error
    - Other

The Supplementary is marked as **Deleted** for transmission to CRA.

# EFILE form MR-69 in ProFile for T1 and T2

The MR-69 form is the Authorization to Communicate Information or Power of Attorney form in ProFile.

ProFile users can upload a signed copy of the MR-69 for RQ to retain in their records using ProFile version 2019.3.0 or later.

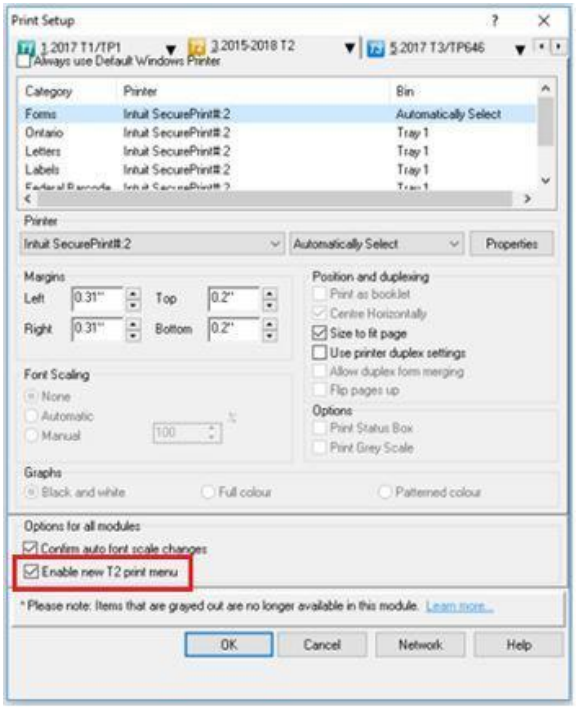
Click here to review our support article on the process for T1 and T2.

## Submitting and Cancelling a Business Consent

Prior to ProFile release 2019.3.0, preparers used forms RC59 and RC59X to submit and cancel a Business Consent with CRA. Forms RC59 and RC59X were updated in ProFile release 2019.3.0 to allow electronic approval of two services: authorization to access client information via online, phone, and mail methods, and the cancellation of existing client access, respectively.

You can review this new process for submitting and cancelling a Business Consent on our support article.

# Using the T2 Print Interface Experience




The T2 print interface uses dynamic menus; this means that only when you select a function (print, email, archive) will the related menu options display in the print interface. This helps keep the print interface clean and simple, as you see only the options for the function activated.

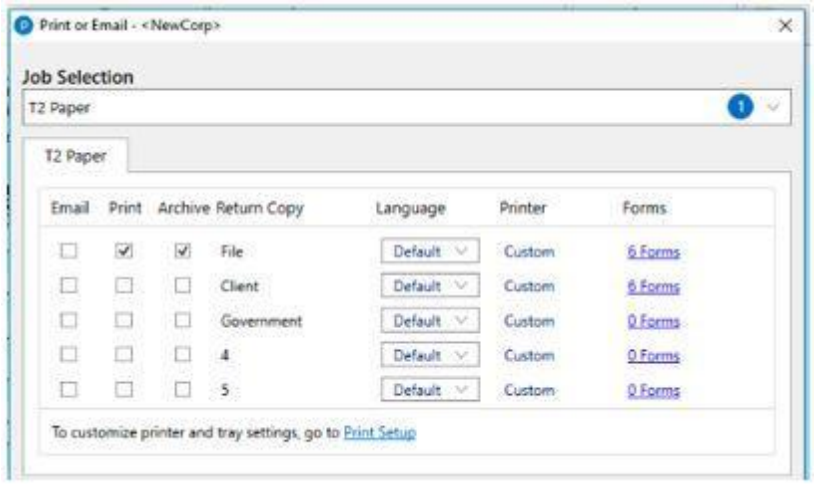
Using the new print interface is currently an optional experience. Preparers can still find the previous print interface in ProFile.

Select the **Print Setup** option from the **File** drop-down menu in the top toolbar.

Click off the selection of the **Enable new T2 print menu** option box and click the **OK** button; the old print interface menu displays.

**Accessing the T2 print interface:**

1. Ensure you are using the latest ProFile release.
2. Open the existing T2 return.
3. Select the **Print Setup** option from the **File** drop-down menu i n the top toolbar; the **Print Setup** menu displays.
4. Select the **Enable new T2 print menu** option box and click the **OK** button; the new print interface menu displays.



# Using the Revamped T2 Print Interface Experience, Continued

**Using the Job Selection section**

The Job Selection section allows preparers to navigate between types of returns and assign parameters for print, email, archiving, and language. The Job Selection drop-down menu populates automatically with print details based on the open T2 return.

Preparers can select a single return type to print, archive, or email from the drop-down list (for example, **T2 Paper**).

Alternatively, preparers can select multiple types of returns to print or email from the drop-down list (for example, **T2 Paper** and **ATI1**).

The details of the selected items display.

The details presented include email, archive, and print options for each item in the return, as well as language preferences and assigned printers.

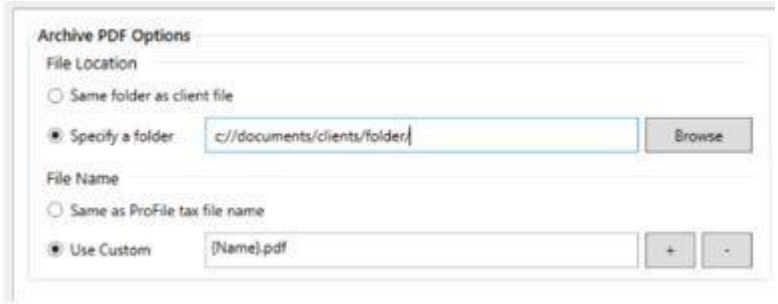
**Using the Archive PDF section:**

Preparers can set the file location and file name for archived forms in the new printer interface.

1. Click the **Archive** option under the job selection to access the **Archive PDF Options** menu in the new print interface.

2. Preparers can select two options for archived PDF locations:

   - Select the **Same folder as client file** option; this places the PDF in the same folder as the existing client file, or:
   - Select the **Specify a folder** option; click the **Browse** button to select a folder for the archived PDF file.



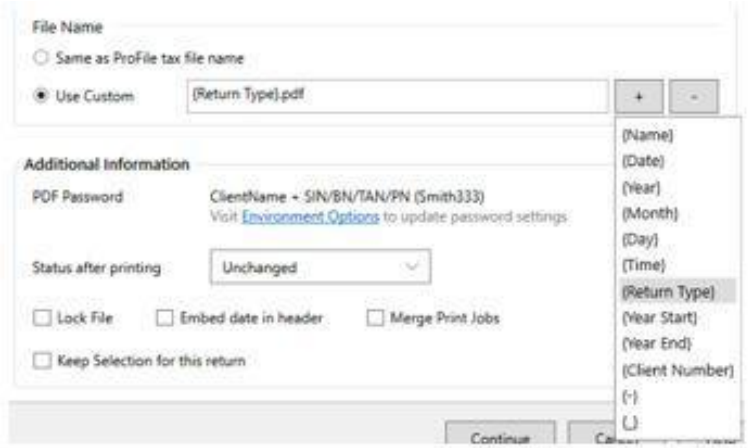

**Note:** The default archive locations pre-populate from the **PDF** tab in the **Environment Options** window.

3. Click the **Continue** button to save the selections.

# Using the Revamped T2 Print Interface Experience, Continued

Preparers can select two options for archived PDF file names:

- Select the **Same as ProFile tax file name** option; this names the archived PDF with the same file name as the tax file, or:
- Select the **Use Customer** option; use the **+** and **-** buttons to assign file name parameters such as name, month, day, time, yearend, and more:




Click the **Continue** button to save the selections.

**Using the Email Options section:**

Preparers can set parameters in the Email Options section for email templates and email addresses.

1. Click the **Email** option under the job selection to access the **Email Options** menu in the new print interface.
2. Select the available email template from the drop-down menu.

**Note:** Email templates source from the designated ProFile **Templates** folder.

3. The client email address – as set on the return – automatically populates in the **Email Address** field. If no client email address is set on the form, enter the address manually.
4. Click the **Continue** button to retain email settings.

The preparer's email program opens a new draft email with the template and client email already entered.

**Related Articles**

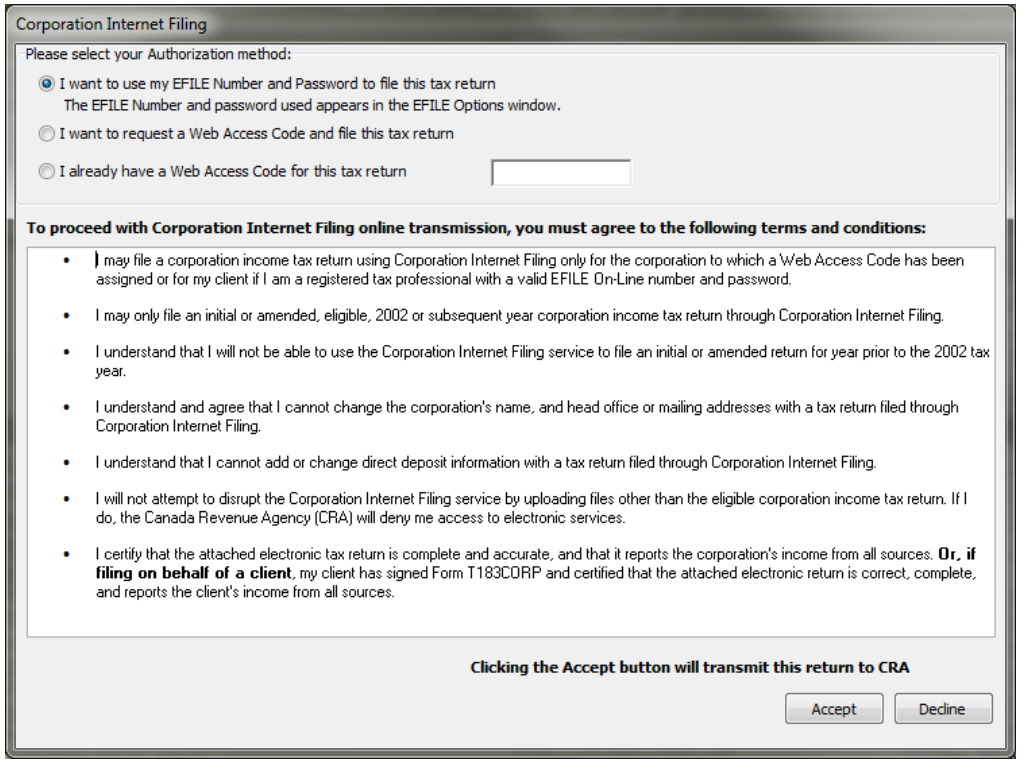
Review the support article for additional details.

# Using EFILE with Web Access Code (WAC) for T2 in ProFile

Corporate returns can undergo EFILE using a Web Access Code (WAC). In some cases, a preparer may not have a need to undertake a request for an EFILE number and the WAC provides a quick, convenient alternative.

ProFile allows users to apply for and receive a WAC online through a ProFile web service, without having to call the CRA Corporation Internet Filing Helpdesk.

Alternatively, users can enter a WAC if already acquired from an earlier EFILE effort/request.


Corporation Internet Filing
Please select your Authorization method:
I want to use my EFILE Number and Password to file this tax return
The EFILE Number and password used appears in the EFILE Options window.
I want to request a Web Access Code and file this tax return
I already have a Web Access Code for this tax return
To proceed with Corporation Internet Filing online transmission, you must agree to the following terms and conditions:
I may file a corporation income tax return using Corporation Internet Filing only for the corporation to which a Web Access Code has been assigned or for my client if I am a registered tax professional with a valid EFILE On-Line number and password.
I may only file an initial or amended, eligible, 2002 or subsequent year corporation income tax return through Corporation Internet Filing.
I understand that I will not be able to use the Corporation Internet Filing service to file an initial or amended return for year prior to the 2002 tax year.
I understand and agree that I cannot change the corporation's name, and head office or mailing addresses with a tax return filed through Corporation Internet Filing.
I understand that I cannot add or change direct deposit information with a tax return filed through Corporation Internet Filing.
I will not attempt to disrupt the Corporation Internet Filing service by uploading files other than the eligible corporation income tax return. If I do, the Canada Revenue Agency (CRA) will deny me access to electronic services.
I certify that the attached electronic tax return is complete and accurate, and that it reports the corporation's income from all sources. Or, if filing on behalf of a client, my client has signed Form T183CORP and certified that the attached electronic return is correct, complete, and reports the client's income from all sources.
Clicking the Accept button will transmit this return to CRA
Accept
Decline

**Applying for a WAC:**

1. Select the **Transmit this return…** option from the **EFILE** drop-down menu in the top toolbar.
2. ProFile reviews the T2 return for any outstanding warning. If there are no auditor warnings, ProFile displays a green checkmark.
3. Click the **OK** button.

The **Corporation Internet Filing** window displays.

**Select the method of filing the return**

- **I want to request a Web Access Code and file this tax return:** This automatically makes a request to CRA for the specific return to undergo EFILE, based on the return's information.
- **I already have a Web Access code for this tax return:** The user enters their existing WAC from a previous EFILE effort/request.

4. Click the **Accept** button; the return transmits using the WAC.

# Attaching Documents for EFILE of T2 Returns with the Attach a Doc Feature

CRA allows corporations to transmit supporting documentation via ProFile's Attach a Doc feature within 24 hours of the EFILE of a T2's initial or amended return.

The following file types can be used as attachments:

- .pdf
- .doc
- .docx
- .xls
- .xlsx
- .rtf
- .txt
- jpg
- .jpeg
- .tiff
- .tif
- .xps

**What is the maximum attachment size?**

The maximum attachment size is 150 megabytes (MB); this is a CRA limitation.

**Is there a limit to the number of attachments transmitted?**

Provided the attachments are transmitted within 24 hours of EFILE of the T2 return, there are no limitations to the number of attachments that can be transmitted.

**Can I make attachments prior to the T2 return being transmitted?**

Yes, but the T2 return must be transmitted first, before the attachments.

Click here to review our support article on using the Attach a Doc feature for T2.

# Corporate Linking for T2

T2 filers can now link data from a related or associated corporation into the RAC Details form of another corporation using ProFile's Corporate Linking function.

Any changes to the data of a related/associated corporation found within a RAC Details form highlights and can synchronize with only a few clicks.

**Who can use Corporate Linking?**

Any ProFile customer who has the T2 module is eligible to use Corporate Linking.

**For which tax years is Corporate Linking applicable?**

Corporate linking is available for T2 returns in the 2015-2018 module or later.

**Will Corporate Linking work for OnePay and Trial licenses?**

Yes.

**Linking a Related or Associated Corporation to a T2 Return**

1. Open the T2 return.
2. Select the + icon on the ProFile top toolbar menu to link a related/associated corporation.
3. Navigate to the folder containing the return being linked.
4. Select the T2 return file of the related/associated corporation being linked.

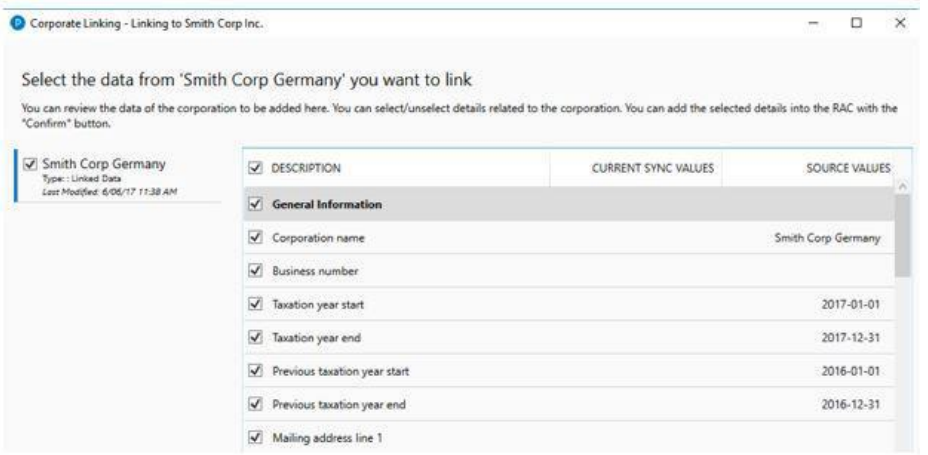
# Corporate Linking for T2, Continued

The details of the related/associated corporation display.

5. Select or unselect the related/associated corporation's data.
6. Click the **Confirm** button.

All selected related/associated data is imported and linked.

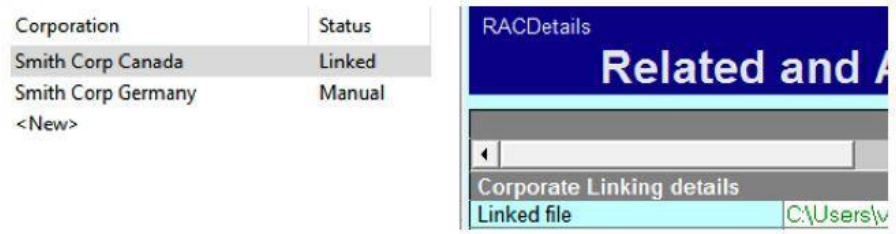
The RAC Details of the newly linked corporation displays and the designation **Linked** is assigned for it in the left-side display menu.


Corporate Linking - Linking to Smith Corp Inc.
Select the data from 'Smith Corp Germany' you want to link
You can review the data of the corporation to be added here. You can select/unselect details related to the corporation. You can add the selected details into the RAC with the "Confirm" button.
Smith Corp Germany
DESCRIPTION
CURRENT SYNC VALUES
SOURCE VALUES
General Information
Corporation name
Smith Corp Germany
Business number
Taxation year start
2017-01-01
Taxation year end
2017-12-31
Previous taxation year start
2016-01-01
Previous taxation year end
2016-12-31
Mailing address line 1

**Reviewing Related/Associated Corporation Status**

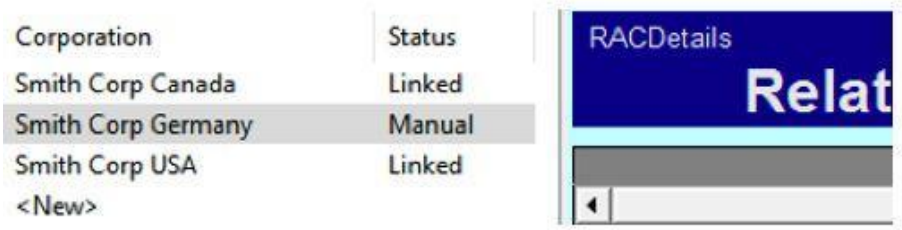
The status of related/associated corporations that are linked - or have been linked previously - to a corporation is displayed in the left-side menu of the linking window.

The following designations can apply to related/associated corporations:




**Linked:** The related/associated corporation is linked.

**Manual:** The related/associated corporation is not linked, but the RAC Details information exists and may be linked.




**Broken:** The related/associated corporation was previously linked, but has since been renamed or moved from its former location (for example, the original file folder or directory). To relink the related/associated corporation, locate the file and select the Confirm button or revert to the original file name.

**Related Articles**

Review the support article for additional details and troubleshooting tips.

# Managing T3 Returns in ProFile

# Overview of T3 Module in ProFile

**About T3 tax forms**

A T3 Statement of Trust Income Allocations and Designations indicates investment income from mutual funds in non-registered accounts and from certain trusts. In Québec, the form is a relevé 16. The income may come from individual investments or from an estate trust as inheritance tax.

Amounts present in box 51 and/or 39 indicates a dividend tax credit is available.

T3 slips show income from interest, dividend, and capital gains. All these types of income are taxed at different rates.

**Receiving the T3 tax slip**

In most cases, T3 tax slips are received around March 31.

# Key Forms for T3 in ProFile

There are some key T3 forms to be mindful of when completing a trust return:

**Beneficiary form**

Use the Beneficiary details form to enter information for trust beneficiaries. Amounts flow from the Beneficiary details form to the corresponding T3, NR4 and RL16 slips. ProFile also uses the Beneficiary details form to complete Schedule 9 in the trust return.

**Allocation worksheet**

Use the Allocation worksheet to indicate how the trust allocates income to beneficiaries. If the trust is claiming expenses at line 41 of the return, apply the expenses to specific types of income before allocating income to the beneficiaries. The trust gets a deduction on the T3 jacket for income that is allocated to the beneficiaries.

Some of the trust income may be taxed in the trust. Specify for each type of income the amount that the trust will retain. ProFile displays the remaining income as the amount to be allocated to the beneficiaries.

On the Allocation form, preparers may also need to enter certain T3 slip amounts, such as a retiring allowance, death benefit, or foreign business income.

# Data Entry and Flow for T3 in ProFile

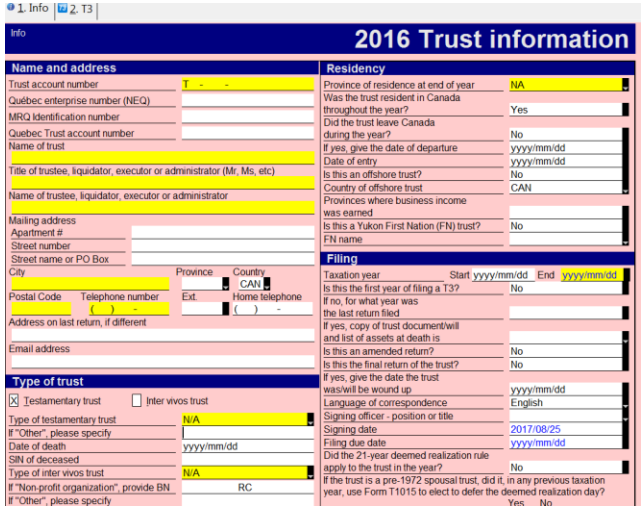
The T3 Info form contains sections for general information, trust type, and other basic details of the trust.

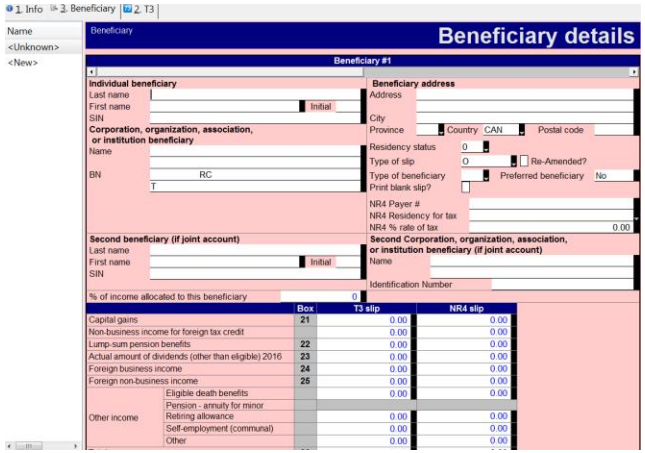
Prepares will report the income and deductions of the trust. Enter these details on the various income and deductions forms, schedules and on the T3 Jacket (which has some edit fields with no supporting schedules).

There are numerous data entry forms, including
business and rental statements, dispositions on Schedule 1, and T3, T5 income received by the trust.

If the trust is allocating income to its beneficiaries, the forms in the Beneficiaries tab of the Form Explorer become important.

Any income not allocated to beneficiaries is taxed on Schedule 11, which transfer to page 4 of the T3 jacket.


1. Info
2. T3
Info
2016 Trust information
Name and address
Trust account number
Québec enterprise number (NEQ)
MRQ Identification number
Quebec Trust account number
Name of trust
Title of trustee, liquidator, executor or administrator (Mr, Ms, etc)
Name of trustee, liquidator, executor or administrator
Mailing address
Apartment #
Street number
Street name or PO Box
City
Province
Country
CAN
Postal Code
Telephone number
Ext.
Home telephone
Address on last return, if different
Email address
Type of trust
Testamentary trust
Inter vivos trust
Type of testamentary trust
If "Other", please specify
Date of death
SIN of deceased
Type of inter vivos trust
If "Non-profit organization", provide BN
If "Other", please specify
Residency
Province of residence at end of year
Was the trust resident in Canada throughout the year?
Did the trust leave Canada during the year?
If yes, give the date of departure
Date of entry
Is this an offshore trust?
Country of offshore trust
Provinces where business income was earned
Is this a Yukon First Nation (FN) trust?
FN name
Filing
Taxation year
Start
End
Is this the first year of filing a T3?
If no, for what year was the last return filed
If yes, copy of trust document/will and list of assets at death is
Is this an amended return?
Is this the final return of the trust?
If yes, give the date the trust was/will be wound up
Language of correspondence
Signing officer - position or title
Signing date
Filing due date
Did the 21-year deemed realization rule apply to the trust in the year?
If the trust is a pre-1972 spousal trust, did it, in any previous taxation year, use Form T1015 to elect to defer the deemed realization day?




### About the Allocation worksheet

The Allocation worksheet is used to complete the slip amounts for beneficiaries.

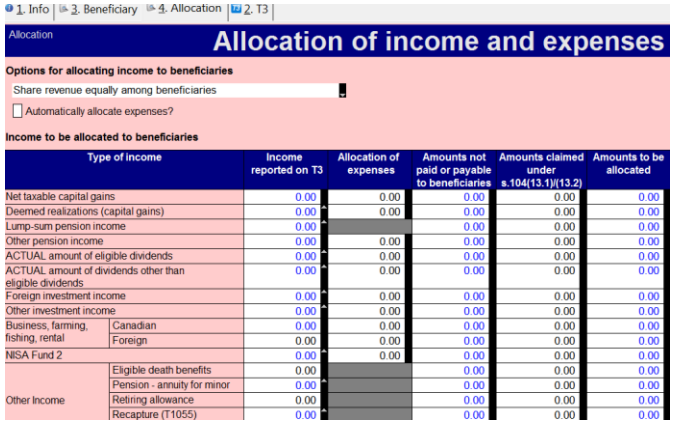
Use this worksheet:

- To indicate how you wish income to be allocated to the beneficiaries: the default is each one gets an equal share of the income. If not the case, choose **Other** and enter the percentage applicable to each beneficiary on the **Beneficiary details** worksheet. If Other is selected, the percentage field on each slip of the Beneficiary worksheet becomes an input field; otherwise, it is calculated based on the equal allocation to all beneficiaries.
- If the trust has claimed expenses at line 41 of the return, the expenses have to be applied to specific types of income before the income can be allocated to a beneficiary. These expenses must be applied manually: an audit message will appear if these expenses have not been entered.
- To retain some of the income to be taxed in the trust. You can specify which type of income and how much is to be retained by the trust.
- To specify amounts for certain boxes of the T3 slips that is not automatically completed by ProFile T3. For example, details related to foreign income and tax paid. Also, if the trust is allocating a retiring allowance or death benefits, those amounts have to be specified here.

# Data Entry and Flow for T3 in ProFile, Continued

### About the Beneficiary worksheet

On the Beneficiary worksheet, enter details such as name, address and residency of the beneficiary. The slip amounts at the bottom of this form are calculated using amounts from the Allocation worksheet multiplied by the percentage applicable to the particular beneficiary (percentage is on the Beneficiary worksheet).


1. Info | 3. Beneficiary | 4. Allocation | 2. T3

Allocation

**Allocation of income and expenses**

**Options for allocating income to beneficiaries**

Share revenue equally among beneficiaries

Automatically allocate expenses?

**Income to be allocated to beneficiaries**

| Type of income | | Income reported on T3 | Allocation of expenses | Amounts not paid or payable to beneficiaries | Amounts claimed under s.104(13.1)/(13.2) | Amounts to be allocated |
|---|---|---|---|---|---|---|
| Net taxable capital gains | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Deemed realizations (capital gains) | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Lump-sum pension income | | 0.00 | | 0.00 | 0.00 | 0.00 |
| Other pension income | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| ACTUAL amount of eligible dividends | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| ACTUAL amount of dividends other than eligible dividends | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Foreign investment income | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Other investment income | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Business, farming, fishing, rental | Canadian | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Foreign | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| NISA Fund 2 | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Other Income | Eligible death benefits | 0.00 | | 0.00 | 0.00 | 0.00 |
| | Pension - annuity for minor | 0.00 | | 0.00 | 0.00 | 0.00 |
| | Retiring allowance | 0.00 | | 0.00 | 0.00 | 0.00 |
| | Recapture (T1055) | 0.00 | | 0.00 | 0.00 | 0.00 |

### Navigating on the Beneficiary worksheet

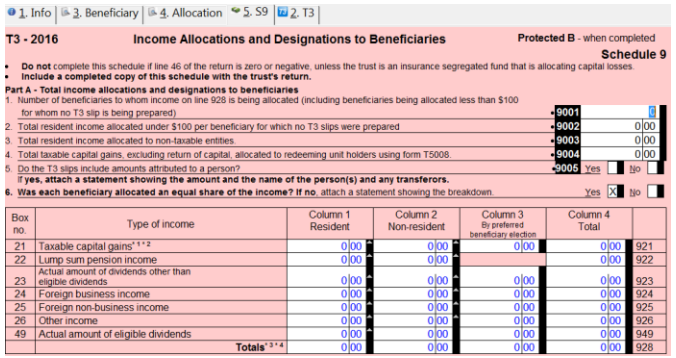
On forms like Beneficiary, where there are an unlimited number of slips, navigation is simplified with the following shortcuts:

- Use the horizontal scroll bar at the top of the slip table to navigate.
- **<Ctrl + Enter>** takes you to the top of the next slip
- **<Shift + Ctrl + Enter>** takes you to the previous slip
- **<Ctrl + Right Arrow>** and **<Ctrl + Left Arrow>** take you to the next or previous column (and scroll to the next or previous slip accordingly)

### Using the Beneficiary worksheet

The information on the Beneficiary worksheet transfers to the T3 and NR4 slips. These slips are for reporting and preview purposes only: data cannot be edited on these forms.

The data from the T3 and NR4 slips is posted to the T3 Summary and NR4 Summary.


1. Info | 3. Beneficiary | 4. Allocation | 5. S9 | 2. T3

T3 - 2016 **Income Allocations and Designations to Beneficiaries** **Protected B** - when completed

**Schedule 9**

- **Do not** complete this schedule if line 46 of the return is zero or negative, unless the trust is an insurance segregated fund that is allocating capital losses.
- **Include a completed copy of this schedule with the trust's return.**

**Part A - Total income allocations and designations to beneficiaries**

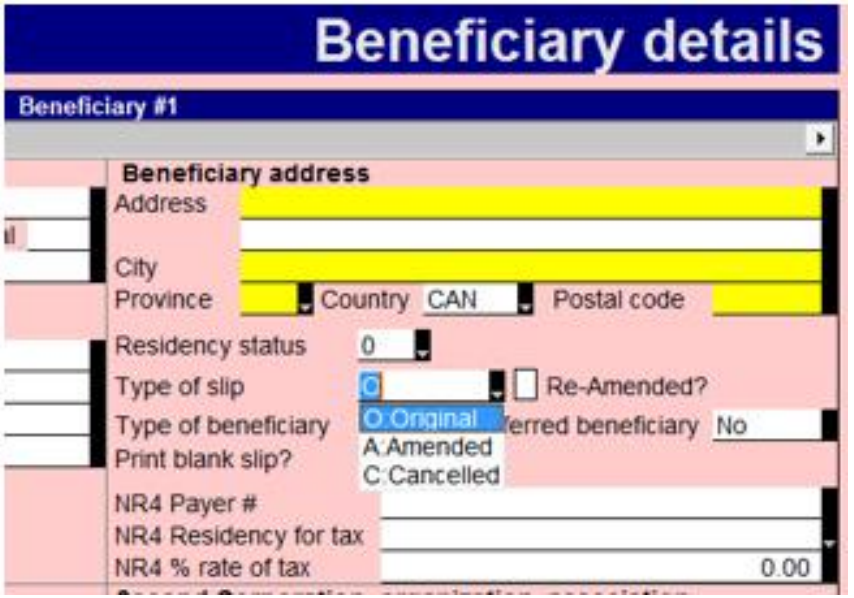
1. Number of beneficiaries to whom income on line 928 is being allocated (including beneficiaries being allocated less than $100 for whom no T3 slip is being prepared) • 9001
2. Total resident income allocated under $100 per beneficiary for which no T3 slips were prepared • 9002 0.00
3. Total resident income allocated to non-taxable entities. • 9003 0.00
4. Total taxable capital gains, excluding return of capital, allocated to redeeming unit holders using form T5008. • 9004 0.00
5. Do the T3 slips include amounts attributed to a person? • 9005 Yes ☐ No ☐
   **If yes, attach a statement showing the amount and the name of the person(s) and any transferors.**
6. **Was each beneficiary allocated an equal share of the income? If no**, attach a statement showing the breakdown. Yes ☒ No ☐

| Box no. | Type of income | Column 1 Resident | Column 2 Non-resident | Column 3 By preferred beneficiary election | Column 4 Total | |
|---|---|---|---|---|---|---|
| 21 | Taxable capital gains[1*2] | 0.00 | 0.00 | 0.00 | 0.00 | 921 |
| 22 | Lump sum pension income | 0.00 | 0.00 | | 0.00 | 922 |
| 23 | Actual amount of dividends other than eligible dividends | 0.00 | 0.00 | 0.00 | 0.00 | 923 |
| 24 | Foreign business income | 0.00 | 0.00 | 0.00 | 0.00 | 924 |
| 25 | Foreign non-business income | 0.00 | 0.00 | 0.00 | 0.00 | 925 |
| 26 | Other income | 0.00 | 0.00 | 0.00 | 0.00 | 926 |
| 49 | Actual amount of eligible dividends | 0.00 | 0.00 | 0.00 | 0.00 | 949 |
| | **Totals**[3*4] | 0.00 | 0.00 | 0.00 | 0.00 | 928 |

Schedule 9 is a summary of the amounts allocated/designated to the beneficiaries. ProFile completes this form using the amounts from the "Beneficiary" worksheet. The trust gets a deduction for the total income allocated to beneficiaries at line 928 of this schedule.

Review the T3 jacket and manually enter data into any fields not automatically calculated by ProFile T3 (especially the questions on the first two pages).

# Using EFILE Slips for T3 in ProFile




**About T3 slip EFILE**

A T3 Trust return must still undergo paper filing. However, the Slips Summary can undergo EFILE with the related slips.

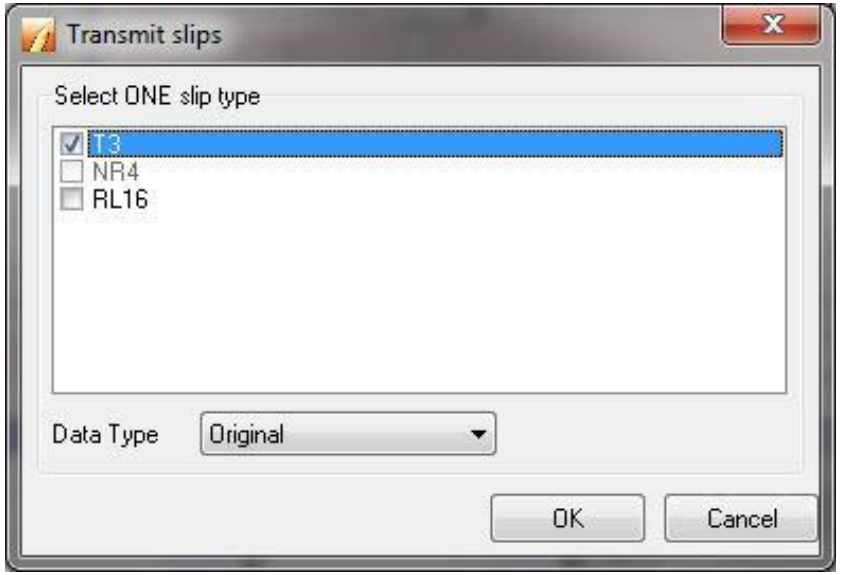
**Note:** Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed. ProFile does not retain a report or record of which slips are transmitted.

**Transmitting slips:**

1. Prepare the T3 slip in ProFile.
2. Open the **Beneficiary details** form and select the **Type of slip** being transmitted.
3. Select the **Transmit** option under the **EFILE** drop-down menu in the top toolbar.
4. Select the appropriate option under the **Data type** drop-down menu and click the **OK** button.

ProFile builds the XML file and automatically launches the CRA transmission window.

5. Review the CRA disclaimer, login, and submit the .xml file.
6. The file submits; click on the **Print** icon on the browser window to print the confirmation number.
7. Click the **Close** button.



# XML File a T3 Return in ProFile

Preparers using ProFile release 2017.2.5 and later can transmit eligible Trust Returns using the Canada Revenue Service's (CRA) Internet file transfer service.

**How does the XML filing for a T3 return work?**

Transmitting an XML file electronically to the CRA is different from the EFILE process.

An XML generates based on the information provided on the T3 return; this XML file transmits to the CRA via ProFile.

The CRA issues a confirmation number following submission to confirm the receipt of the XML file.

The preparer inserts the CRA confirmation number on the T3 return.

**What are the requirements for the XML filing of a T3 return?**

The CRA maintains a detailed list of restrictions for filing a T3 return electronically.

Please review the list prior to undertaking an XML filing.

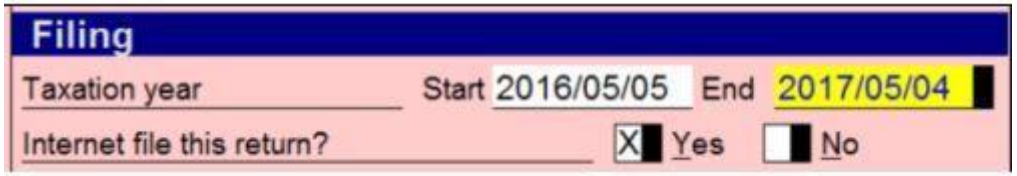
**What tax years are eligible for the XML filing of a T3 return?**

XML filing for T3 returns occurs for 2017 and onwards. A T3 return undergoing XML filing cannot have a year-end date prior to January 1, 2017.

# XML File a T3 Return in ProFile, Continued

**Preparing a T3 return for XML filing:**

1. Open ProFile.
2. Prepare the T3 return.
3. Resolve any error messages displayed under the **MagMedia** tab of the Active Auditor.




If the information on the return is complete, valid, and eligible for the Internet file transfer service, the **Internet file this return?** question in the return's **Filing** section checks automatically.

**Note:** If the return is not valid, the question remains unchecked and prevents the XML file from transmitting. See section **Using the T3 EFILE** below for resolution.

**Using the T3 EFILE**

Beginning with the release of 2021.3.0, returns with a year end of 2021 or later will be able to be electronically filed using CRA EFILE credentials. Returns are still required to not have any exclusions on the T3Efile worksheet.

A newer section on the **Info** page under Filing will default to **Yes** if a T3 is eligible for EFILE and **No** if not.

Slips and summaries must still be transmitted via XML filing.

1. To EFILE the return, select **EFILE** in the menu bar and then **Transmit T3 return**.

The interface displays.

2. Select the type of T3 you are filing and click **Next**.

If your T3 file has EFILE errors, you'll see a rejection box outlining what needs to be corrected.

Returns are submitted to CRA in JSON format. The JSON along with the acceptance or rejection message will be stored in the folder selected in the **T3 EFILE** -> **Options** directory.

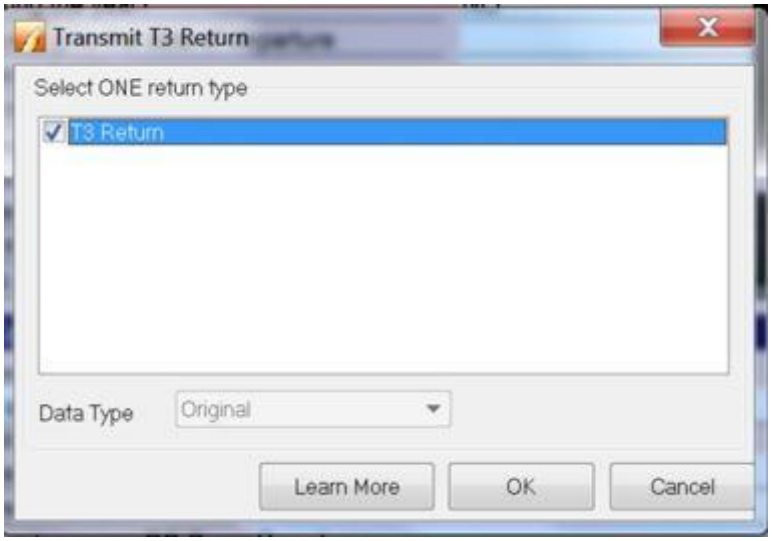
The confirmation number displays on the **Info** page if successfully transmitted.

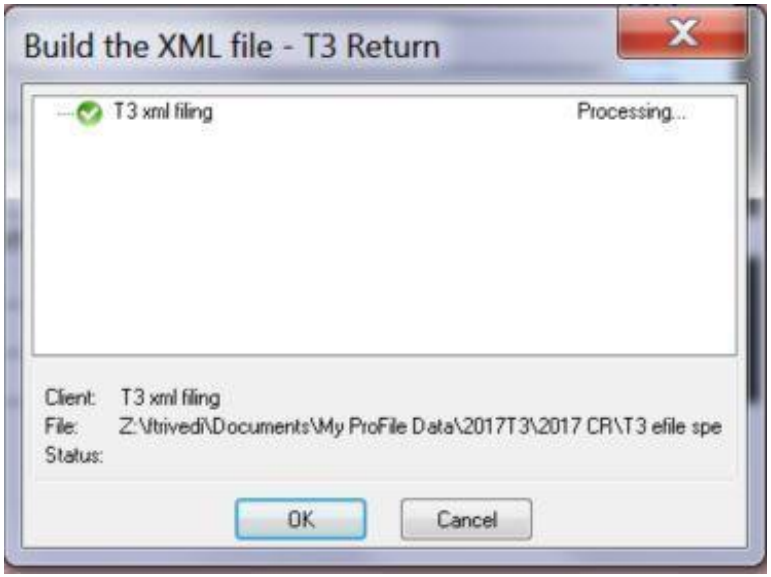
# XML File a T3 Return in ProFile, Continued

**XML filing a T3 return:**

1. Open the populated T3 return.
2. Select the **Transmit T3 Return option** from the **EFILE** drop-down menu in the top toolbar; the **Transmit T3 Return** window displays.
3. Select a **return type** (for example, **T3 Return**).
4. Click the **OK** button; the XML file builds.

   If successful, a message indicating the processing and completion of the XML build displays.
5. Click **OK**.



# XML file a T3 Return in ProFile, Continued

ProFile automatically opens the CRA transmission window.

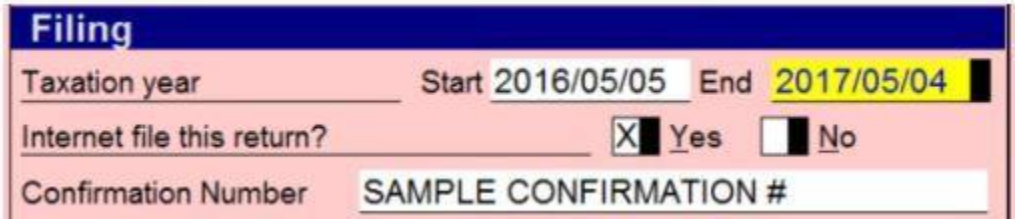
6. Enter the preparer account number and Web access code when prompted.
7. Click the **Next** button; the **Internet file transfer – attach your return** window displays.

**Note:** The XML file path already populates in the directory field. To search for a different XML file, click the **Browse** button.

8. Click the **Submit** button; the XML file transmits to the CRA.

The CRA provides a confirmation number following transmission.

9. Manually enter the confirmation number in the **Confirmation Number** field of the T3 return's **Filing** section.
10. Save the return.




**Related Articles**

Review the support article for additional details.

# Early Filing Next Year for T3 in ProFile

The next year's T3 module in ProFile is not available until the year after: for example, when the 2019 T3 module is the last one released and you need to prepare a T3 return with 2020 year-end, the 2020 T3 module is not available until January of 2020. In this situation, the previous year's T3 module is used for preparing next year's T3 return.

**New tax rate implementation**

New tax rates are implemented in the previous year's T3 module to handle preparation of next year's T3 returns. Entering the appropriate year-end on the **Info** page initiates the applicable tax rates for that year. T3 returns filed using the previous year's tax forms are acceptable to CRA, and they will reassess the return if required.

**Preparing next year's T3 return using the previous year's T3 module**:

1. Save a duplicate copy of the previous year's T3 return to be used as the next year's T3 return.
2. Open the previous year-end T3 return in ProFile.
3. Enter the appropriate year-end for the trust return T3 to be prepared; this initiates the applicable tax rates for next year.
4. Delete the information pertaining to the previous year-end, keeping what is required for the next year-end.
5. Enter the T3 data required for filing the next year's trust return, allocate income to beneficiaries, and create the T3 slips.
6. Print the T3 trust return using **File -> Print** and print T3 slips using **File -> Print Slips**.
7. Save the T3 trust return with a different file name to identify the tax rates for that year.

# Managing Form Expert (FX) Module in ProFile

# Overview of Form Expert (FX) Module in ProFile

FX & FX/Q includes a comprehensive set of tax forms that are fully interactive, automatically performing all calculations.

The forms include:

- T4, T5, T5018, T5008, T5013, RL1, RL3, RL15, and more
- Partnership Information Return and Schedules (T5013 Schedules and TP600 for Québec)
- Charity & Non-Profit Organization forms (T3010 and TP-985.22 for Québec)
- Additional GST/HST/QST, TD1, RCA, Non-resident and Recourse forms
- Federal, Québec and provincial rollover forms (T2057, T2058, T2059, TP529, TP614, AT107, AT108 and AT109)
- BC Logging Tax Return of Income (FIN542 and FIN571)
- Other forms (for example, RC199, CPT30, T3D, T3RI, etc.)

**Related Articles**

Review the list of ProFile forms and tax slips that can be filed electronically.

# EFILE Slips for FX Module in ProFile

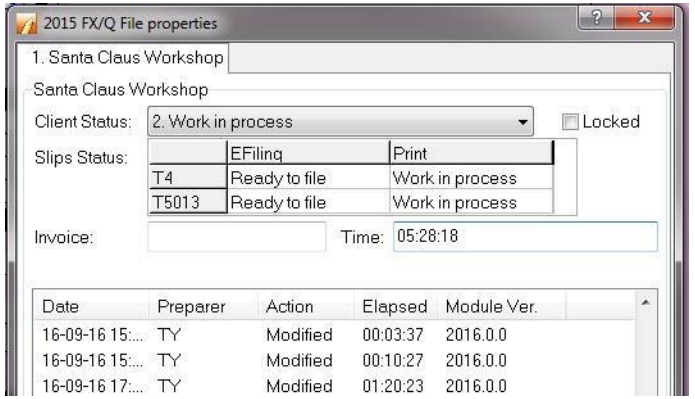
**Note:** ProFile does not retain a report or record of which slips are transmitted. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

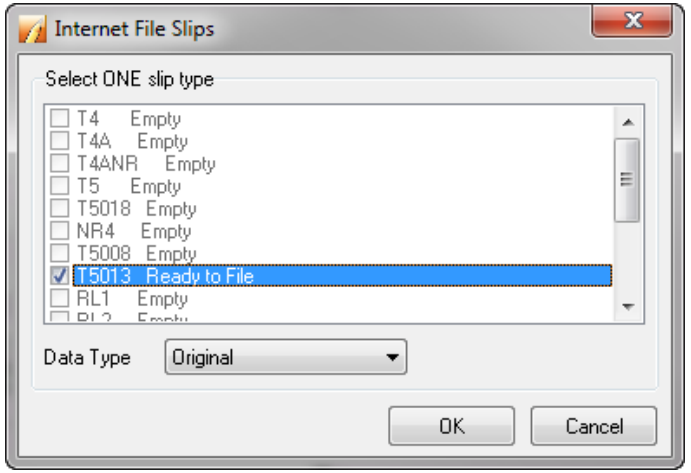
**EFILE original and amended slips:**

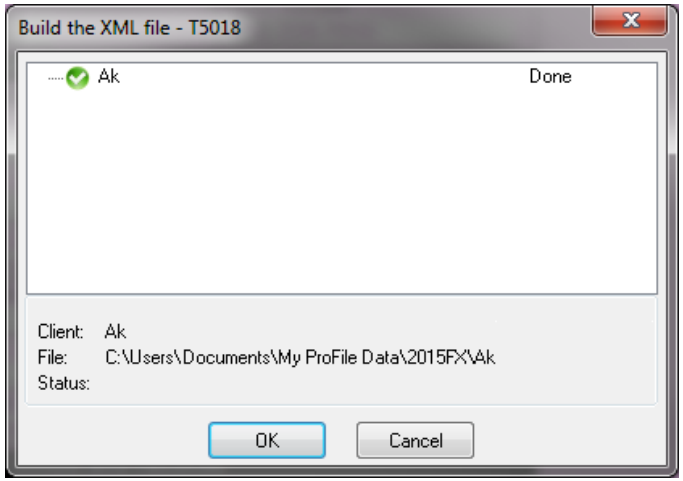
1. Navigate to the **Info** tab of the return.
2. Ensure the **Yes** option is selected for the question **Are you magnetic media or internet filing slips?** The option to EFILE slips will not appear unless this option is selected.
3. Select the **Properties…** option from the **File** drop-down menu in the top toolbar; the **FX/Q File properties** window displays.
4. Set the **EFiling status** in the **Slips Status:** section to **Ready to file**.
5. Select the **Transmit slips** or a **T5013 return option** from the **EFILE** drop-down menu in the top toolbar; the **Internet File Slips** window displays.
6. Select the slip to undergo EFILE.
7. Select the appropriate option under the **Data type** drop-down menu and click the **OK** button.

ProFile builds the XML file and automatically launches the CRA transmission window.

8. Review the CRA disclaimer, log in, and submit the .xml file.
9. The file submits; click on the **Print** icon on the browser window to print the confirmation number.
10. Click the **Close** button.

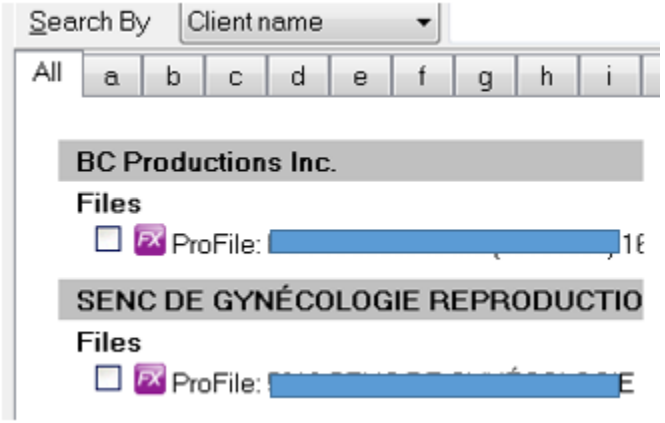


# Batch EFILE Slips for FX module in ProFile

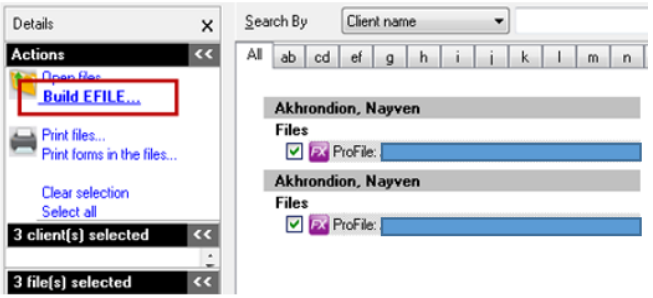
Multiple FX slips can undergo a batch transmit slips at one time using the Client Explorer database.




**Starting the Client Explorer database:**

1. Select **Database…** from the **Options** drop-down menu in the top toolbar; the **Database/Client Explorer Options** window displays.
2. Select the **Use Client Explorer** option.
3. Click the **OK** button.
4. Select the **Client Explorer** option under the **GoTo** drop-down menu in the top toolbar.

The **Client Explorer** displays.




**Filtering and selecting returns**:

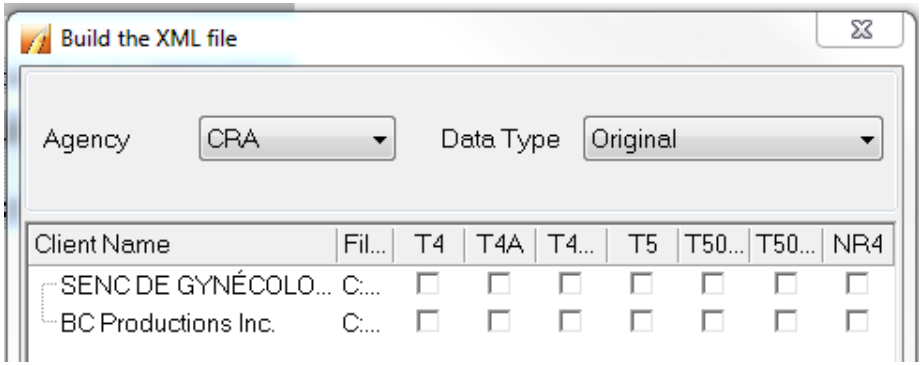
1. Click the **Filter** button; the filter window displays at the bottom of the window.
2. Select the checkbox on the **FX** tab and clear the other module tabs by unchecking them.
3. Select the checkbox for the desired tax year (for example, **2019**) on the **FX** tab and clear the checkboxes for all other years by unchecking them.
4. Select the appropriate checkboxes in the remaining sections of the **FX** tab to filter for slip details; clear the other options by unchecking them.
5. Click the **Apply Filters** button; a list of slips that meet the set slip criteria displays.
6. Select the slips to EFILE.

# Batch EFILE Slips for FX Module in ProFile, Continued

**Building the EFILE Link:**

1. Click the **Build EFILE…** link in the top-left **Actions** menu.

The **Build the XML file** window displays.




2. Select the slips to undergo EFILE (for example, **T4**).
3. Click the **OK** button.

The XML file builds and the **CRA Internet File Transfer** window opens.

**Transmitting the XML file to CRA:**

1. Log onto the CRA slip transmission website.

**Note:** Transmission of the XML file requires an FX Web Access Code (WAC). If this is the first time internet filing slips, a WAC request must be made to the CRA. Ensure that you print a confirmation copy provided by the CRA for your submission records.

2. Complete the XML transmission process.

Canada
Canada Revenue Agency
www.cra.gc.ca
Français
Home
Contact Us
Help
Search
canada.gc.ca
Return to Filing Information Returns Electronically
Need a Web access code?
Internet File Transfer (XML)
To file your electronic information return you must provide the following information:
Step1: Identification area
Your account number: (required)
Note: Do not enter dashes or spaces in the account number.
and
Your Web access code: (required)
letters which must be entered in the same upper or lower case as when it was provided to you.
Continue to step two
Date Modified: 2015-01-05
Top of Page
Important Notices

# Transmitting RL Slips for Form Expert (FX) in ProFile

Included in the 2018.2.0 and later ProFile release is a revised method for transmitting RL Slips for the FX module to Revenu Québec.

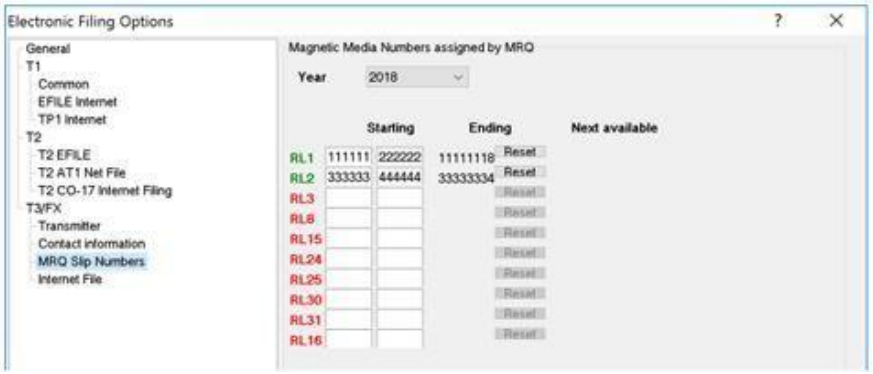
The new process eliminates the need to attach an .xml file to the RL slip transmission and instead transmits the information directly to Revenu Québec.

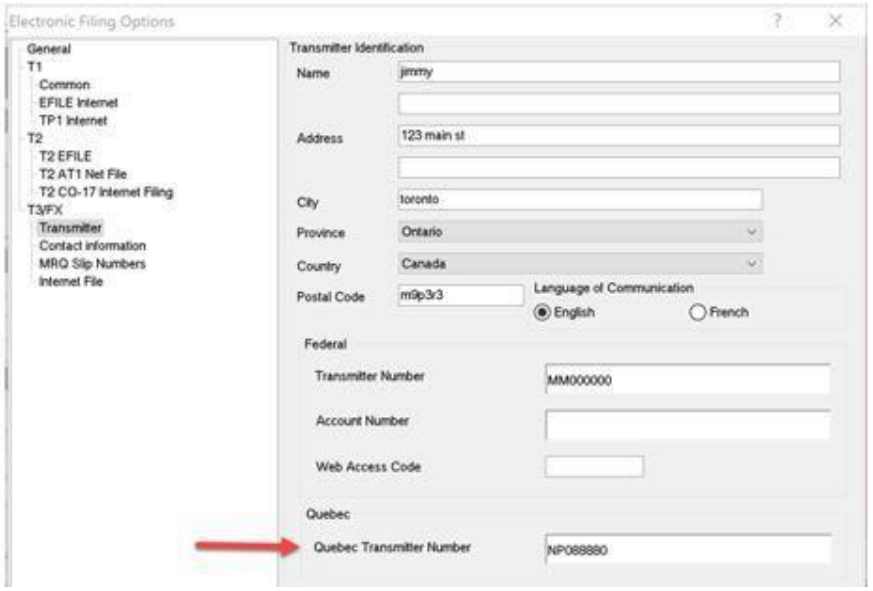
**Setting credentials prior to transmission:**

1. Select **Options…** under the **EFILE** menu in the top toolbar.

The **Electronic Filing Options** window displays.

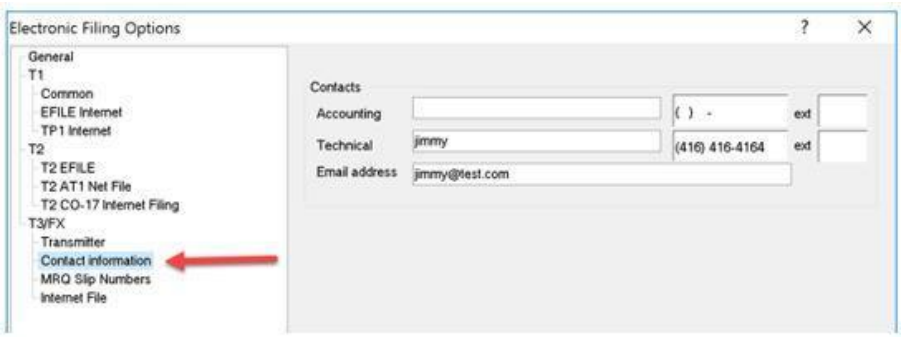
2. Select the **MRQ Slip Numbers** option under **T3/FX** on the left-side menu.
3. Enter the Magnetic Media slip numbers.
4. Select the **Transmitter** option under **T3/FX** on the left-side menu.
5. Enter the **Québec Transmitter Number**.



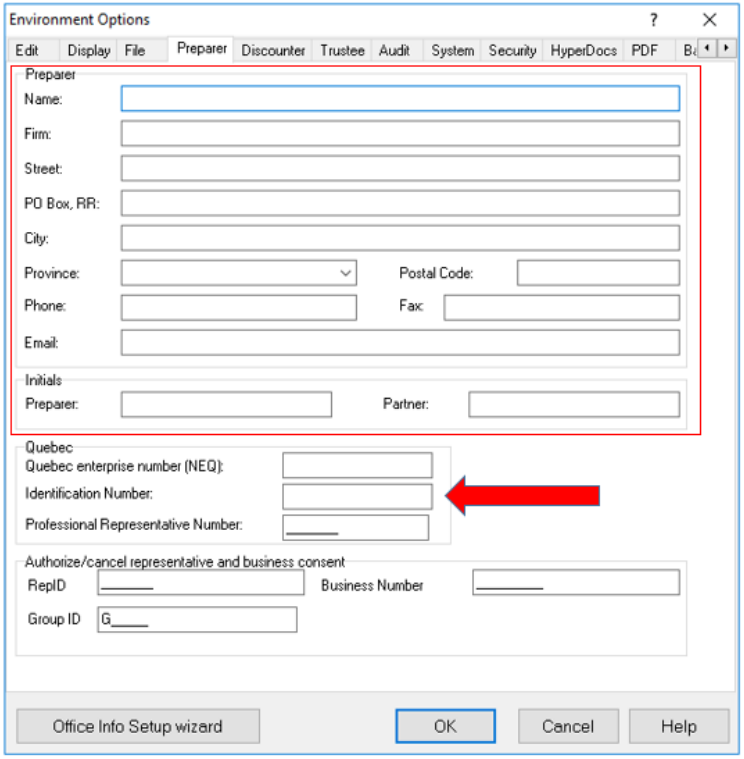
# Transmitting RL Slips for Form Expert (FX) in ProFile, Continued

6. Select the **Contact information** option under **T3/FX** on the left-side menu.




The **Contacts** window displays.

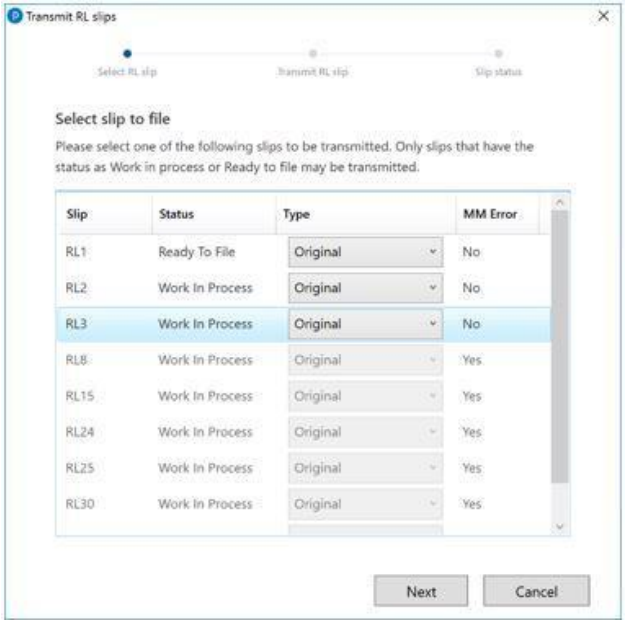
7. Enter all requested contact information in the **Accounting** section; this is essential to avoid transmission errors. Requested contact information in the **Technical** section is optional to provide.
8. Click the **OK** button; the contact information saves.
9. Select the **Environment…** option from the **Options** drop-down menu in the top toolbar.

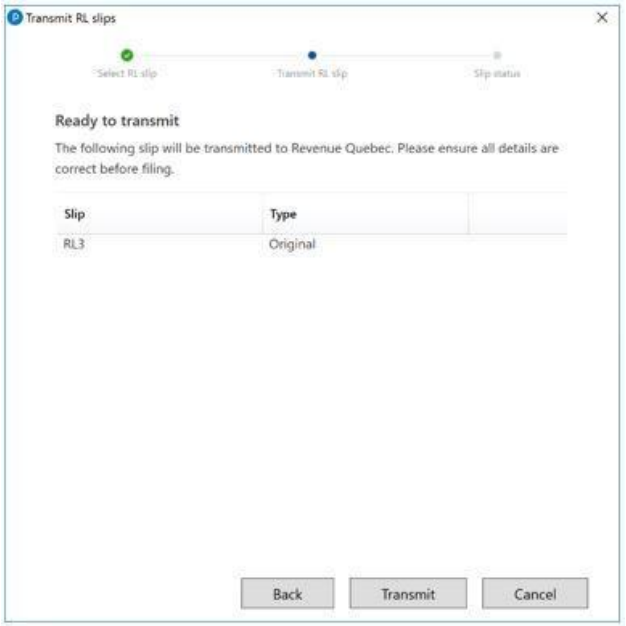



The **Environment Options** window displays.

10. Navigate to the **Preparer** tab.
11. Populate the fields under the **Preparer** section; this is essential to avoid transmission errors.
12. Enter the **Identification Number** in the tab.
13. Click the **OK** button; the settings save.

# Transmitting RL Slips for Form Expert (FX) in ProFile, Continued




**Transmitting slips:**

**Note:** The new RL slip transmission process means that an .xml file no longer generates and stores on the user's computer. The information transmits directly to Revenu Québec.

1. Open the return.
2. Select the **Transmit RL slips** option under the **EFILE** drop-down menu in the top toolbar.

The **Transmit RL slips** window displays.

3. Select the slip or slips to transmit.
4. Set the slip type in the **Type** column.
5. Click the **Next** button.

The **Ready to transmit** window summarizes the slip details.

6. Ensure all slip details are accurate before transmitting.
7. Click the **Transmit** button; the slip transmits.

A confirmation displays when the transmission completes successfully.

**Note:** Please be aware that there is no retention of slip submissions or results by ProFile.

**Related Articles**

Review the support article for additional details, including reviewing and printing a transmission confirmation number.

# Transmitting Amended Slips for Form Expert (FX) in ProFile

Preparers can electronically file an amended slip through the FX module.

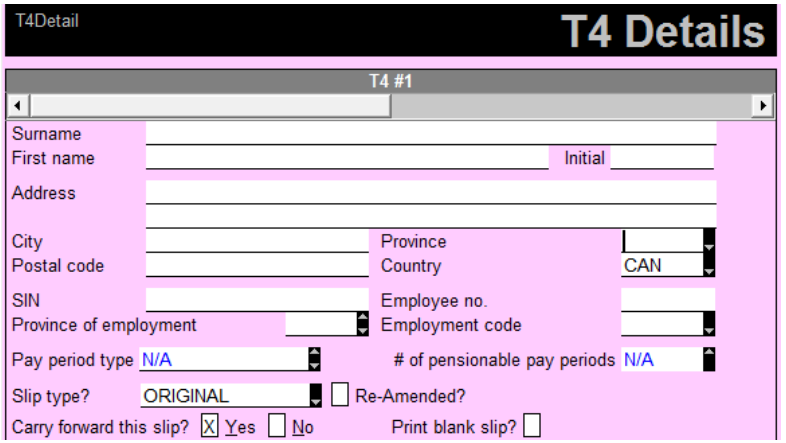
**Note:** ProFile does not retain a report or record of which slips transmit. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

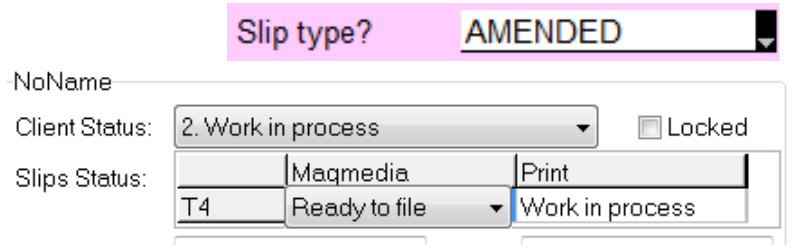
**Transmitting an amended slip:**

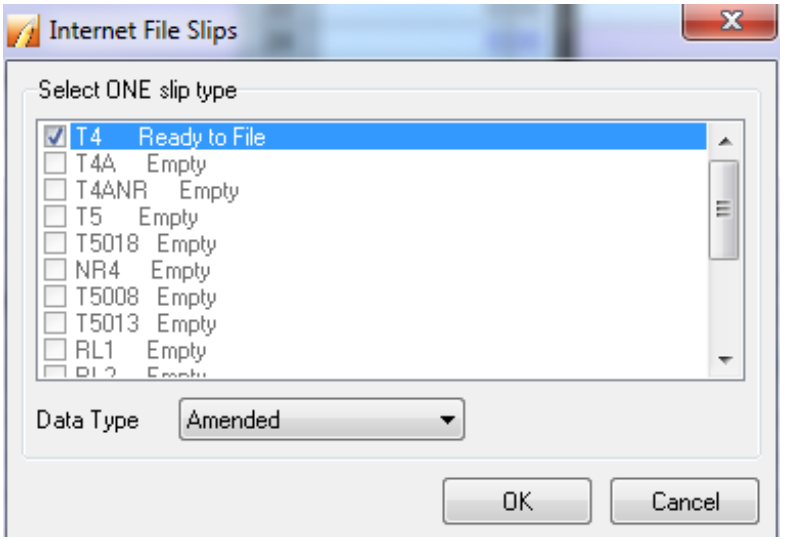
1. Open the applicable return in ProFile (for example, a T4).
2. Under the **Slip type?** section, set the type to **AMENDED.**
3. Make all the necessary changes to the slip.
4. Select the **Properties…** option under the ProFile **File** drop-down menu in the top toolbar.
5. Set the **Slip Status** for **Magmedia** to **Ready to File**.
6. Select the **Internet File Slips** option under the ProFile **EFILE** drop-down menu.
7. Check the box of the slip to be transmitted (for example, **T4**).
8. Change the data type to **Amended** in the **Data Type** drop-down menu.
9. Click the **OK** button; the amended slip transmits.

ProFile builds the XML file and automatically launches the CRA transmission window.

10. Review the CRA disclaimer, log in, and submit the .xml file.
11. The file submits; click on the **Print** icon on the browser window to print the confirmation number.
12. Click the **Close** button.



# Transmitting a Cancelled Slip for Form Expert (FX) in ProFile

Preparers can electronically file a cancelled slip through the FX module.

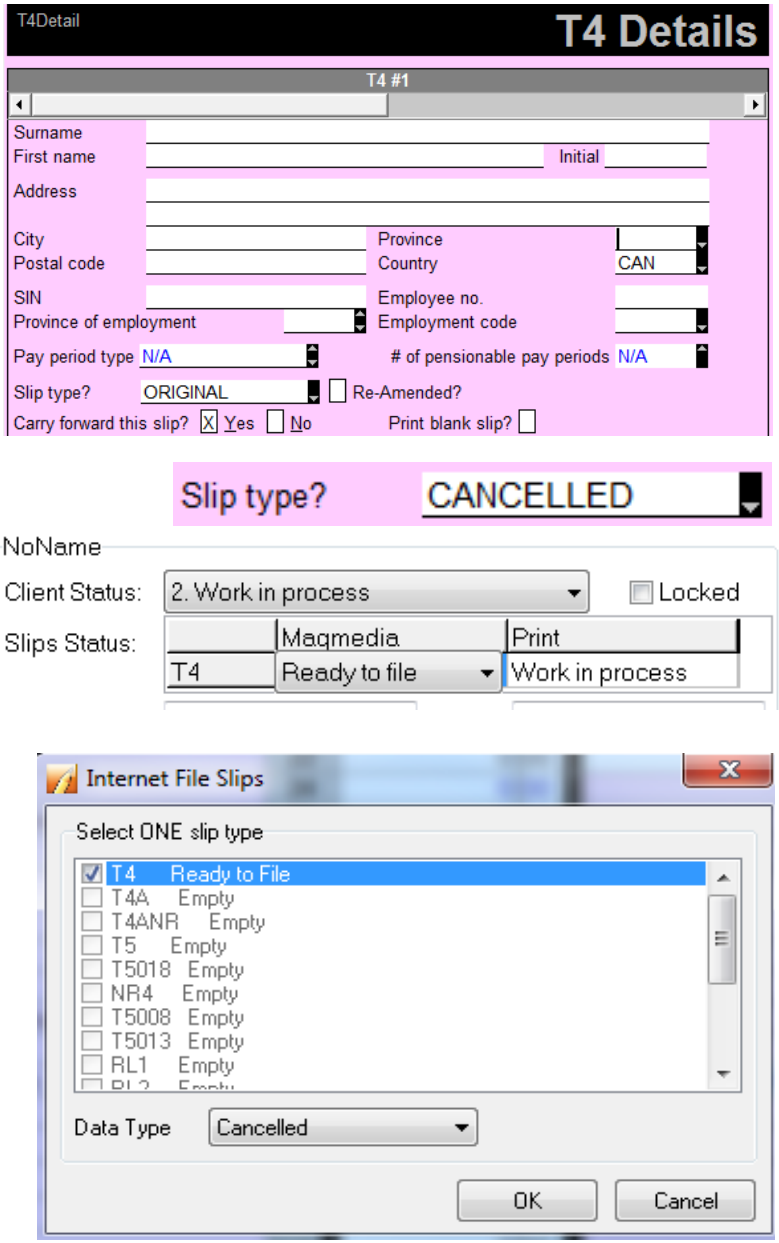
**Note:** ProFile does not retain a report or record of which slips are transmitted. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

**Transmitting a cancelled slip:**

1. Open the applicable return in ProFile (for example, a T4).
2. Under the **Slip type?** section, set the type to **CANCELLED.** When transmitting, the slips automatically revert to a value of **0**.
3. Select the **Properties…** option under the ProFile **File** drop-down menu in the top toolbar.
4. Set the **Slip Status** for **Magmedia** to **Ready to File**.
5. Select the **Internet File Slips** option under the ProFile **EFILE** drop-down menu.
6. Check the box of the slip to transmit (for example, **T4**).
7. Change the data type to **Cancelled** in the **Data Type** drop-down menu.
8. Click the **OK** button; the amended slip transmits.

ProFile builds the XML file and automatically launches the CRA transmission window.

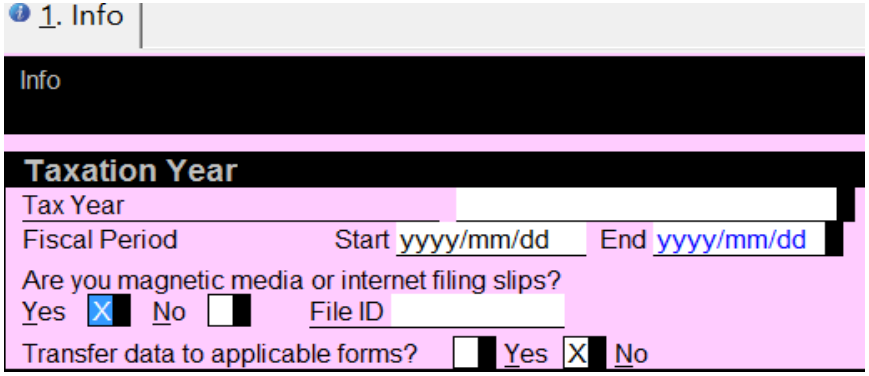
9. Review the CRA disclaimer, login, and submit the .xml file.
10. The file submits; click on the **Print** icon on the browser window to print the confirmation number.
11. Click the **Close** button.



# Verifying Client Data for Form Expert (FX) in ProFile

**Verifying Client Data before filing slips in FX module**

Before transmitting a slip or return information with EFILE, ensure that the file is complete and accurate. ProFile includes audit and review tools that can help.



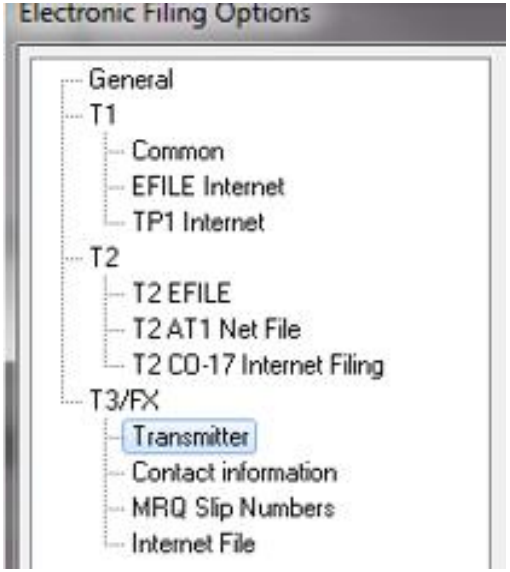

**FX Module:**

1. Ensure the question **Are you magnetic media or internet filing slips?** on the **Info** form is set to **Yes**.

2. Ensure any messages in the **Active Auditor**, especially those in the **Mag Media** tab, are resolved. Double-click the message in the **Auditor** to identify the area that needs reviewing.

3. When undertaking the initial EFILE of a slip, preparers enter the transmitter number in the EFILE wizard. If a transmitter number has not been provided, use the default **MM000000**.

4. If transmitter information must be changed in the future, select **EFILE -> Options -> Transmitter** under the **T3/FX** section. Information can be updated as required.

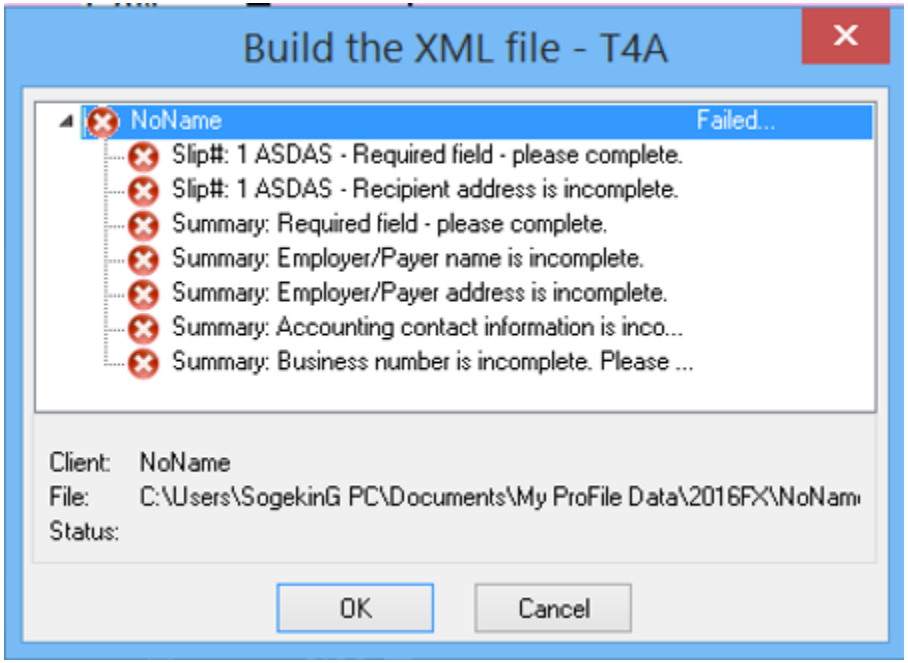


# Verifying Client Data for Form Expert (FX) in ProFile, Continued

When ProFile builds an XML file suitable for transmission, it flags slips and information in which there are issues that prevent the XML file from being built. View a brief summary of the problems affecting a file by clicking the (+) symbol adjacent to a failed file. Hover the mouse over the message to read the full text.

A common cause of invalid XML files is the use of overrides on fields that are included in the information that is to be sent (for example, when overriding a field instead of using amounts that ProFile calculates or carries from another form.) Avoid using the override feature whenever possible.

**Note:** ProFile cannot identify the location of any error; it is necessary to locate the error yourself as a user.

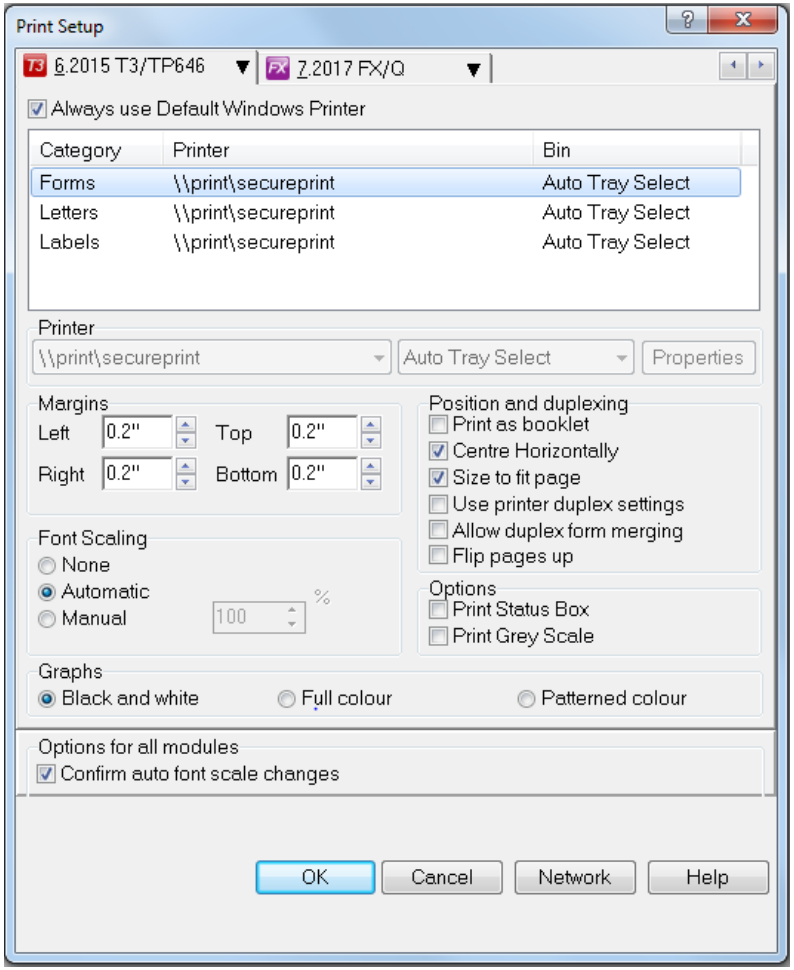

Build the XML file - T4A
NoName
Failed...
Slip#: 1 ASDAS - Required field - please complete.
Slip#: 1 ASDAS - Recipient address is incomplete.
Summary: Required field - please complete.
Summary: Employer/Payer name is incomplete.
Summary: Employer/Payer address is incomplete.
Summary: Accounting contact information is inco...
Summary: Business number is incomplete. Please ...
Client: NoName
File: C:\Users\SogekinG PC\Documents\My ProFile Data\2016FX\NoNam
Status:
OK
Cancel

# Print Setup for Form Expert (FX) in ProFile

1. Select the **Print Setup…** option from the **File** drop-down menu in the top toolbar.

The **Print Setup** window displays.

2. Select the correct year for the module; the available print settings display.
3. Applicable forms, jackets, letters, and more that are applicable to the module list under the **Category** column.
4. Select each available category and set/approve the margin settings, font scaling, position, duplexing, and other printing values.
5. Click the **OK** button to save the print setup settings.



# Purchasing and Using ProFile 20

# Using ProFile 20

ProFile 20 is a bundle of 20 returns that provides a more cost-efficient alternative to preparers than buying individual OnePay returns. It is best suited for preparers who have 20 or fewer T1/TP1 returns to file.

ProFile 20 supports T1/TP1 returns for tax years 2015, 2016, 2017, 2018, 2019, 2020, and 2021.

ProFile 20 customers are charged a return ONLY when they EFILE a return or print a return using the T1 Condensed setting.

**Getting started**

Visit our ProFile 20 website or call our sales team at **1-844-861-3599** to purchase ProFile 20.

**Accessing ProFile 20:**

ProFile 20 customers receive an email containing their Product Code and License Key.

1. Open ProFile.
2. Select the **Manage Licenses** option from the **Help** drop-down menu in the top toolbar; the **License** wizard displays.
3. Click the **Add New License** button; the **ProFile License Activation** window displays.
4. Enter the **Product Code** and **License Key** from the email and click the **Activate** button.

The ProFile license activates. You can now print and EFILE T1/TP1 returns using ProFile 20.

**Am I charged a ProFile 20 return if I just prepare a return?**

No. ProFile 20 customers can prepare as many T1/TP1 returns as they like without being charged.

**Does ProFile 20 work with Flexible Licensing?**

Yes.

# Using ProFile 20, Continued

**How many ProFile 20 licenses can I buy at one time?**

Only a single ProFile 20 license may be purchased at one time.

If more than 20 returns need to be filed or printed, preparers can purchase another ProFile 20 license when all returns are used, or opt for OnePay or the purchase of the unlimited version.

**Will I get a refund for unused ProFile 20 returns?**

No, there are no refunds provided for unused ProFile 20 returns.

**Can I use the remaining returns on my ProFile 20 2018 license for 2019 R1 returns?**

No. In this example, any remaining ProFile 20 returns would need to be used to EFILE or print 2015, 2016, 2017, 2018, 2019, and/or 2020 returns only.

**Will I be notified how many ProFile 20 returns I have remaining when submitting or printing a return?**

An assessment window displays the remaining number of ProFile 20 returns when a return is used.

**Will I be informed when all ProFile 20 returns have been used?**

A notification window indicates when all ProFile 20 returns have been used:

**Related Articles**

Review the support article for additional details.

# Managing Printing in ProFile

# Print Setup in ProFile

1. Select the **Print Setup…** option from the **File** drop-down menu in the top toolbar.

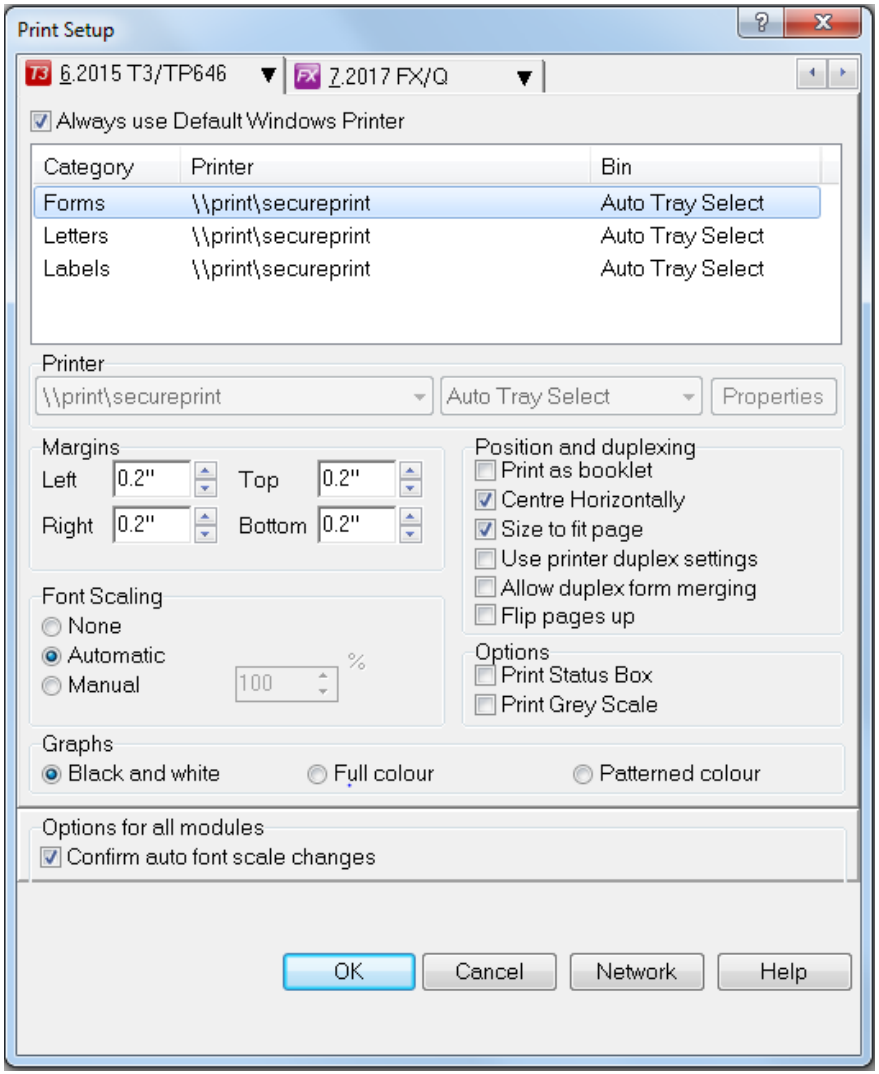
The **Print Setup** window displays.

2. Select the correct year for the module; the available print settings display.

Applicable forms, jackets, letters, and more that are applicable to the module are listed under the **Category** column.

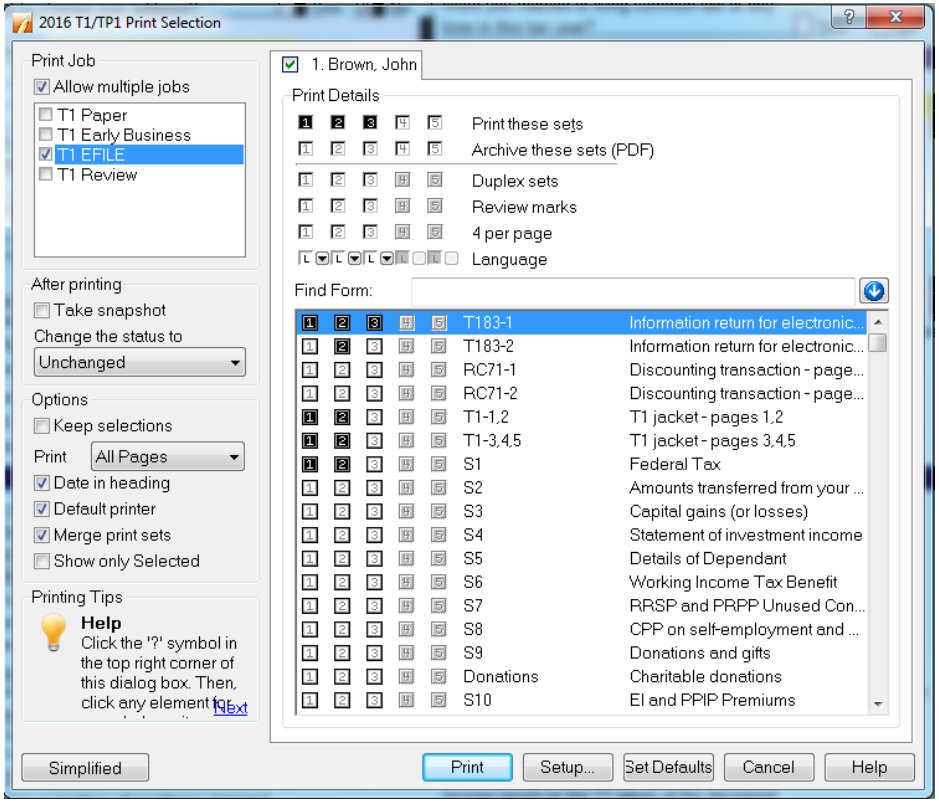
3. Select each available category and set/approve the margin settings, font scaling, position, duplexing, and other printing values.

4. Click the **OK** button to save the print setup settings.



# Printing Different Copies

ProFile users can set the print job options for returns and forms.




**Setting print job options:**

1. Open the return in ProFile.
2. Select the **Print…** option from the **File** drop-down menu in the top toolbar.

The **Print Selection** window displays.

3. The **Print Job** section in the top-left corner of the window displays the print job types (for example, **T1 Paper**).

**Note:** The province of residency selected on the return determines the available print jobs. For example, setting **Quebec** as the province of residency displays TP1 print jobs.

4. Set the print job settings along the section on the left side of the window.

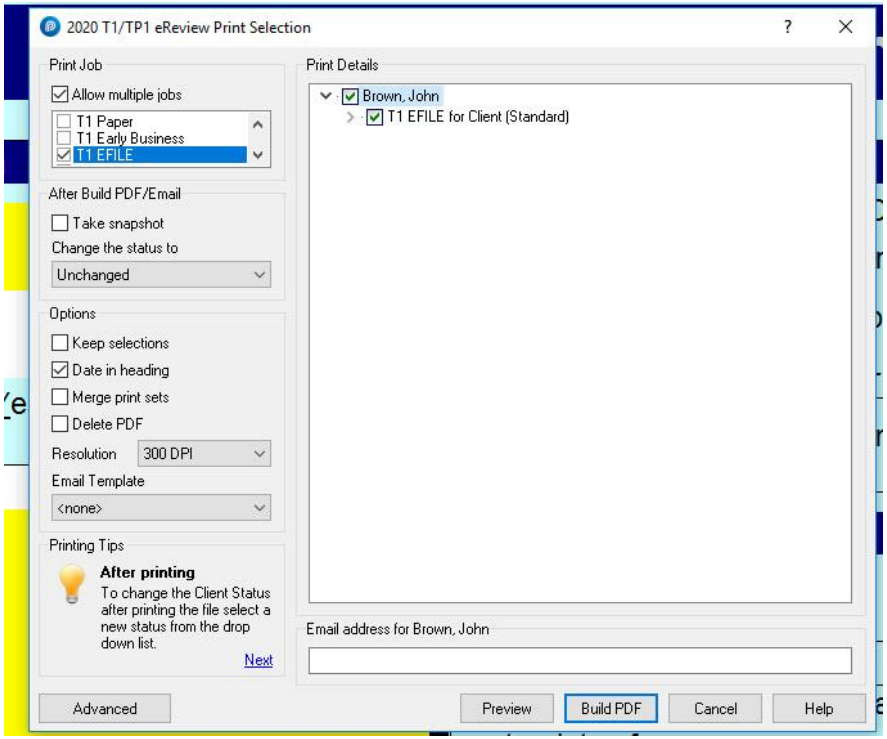
**Advanced and simplified settings:**

1. Click the **Advanced** button in the bottom-left corner; the advanced print job options display.
2. To return to the simplified view, click the **Simplified** button in the bottom-left corner.

**Printing jobs:**

1. Click the **Set Defaults** button to set the selected print job options as the default.
2. Click the **Print** button to print the print job.

# Printing to PDF in ProFile




**Setting print to PDF options:**

1. Open the return.
2. Select the **Print/Email PDF…** option from the **File** drop-down menu in the top toolbar.

The **Print Selection** window displays.

3. Several options for PDF printing are available, including:

- Setting the print job type in the top-left menu (Print Job)
- Setting print job options under the Options section
- Setting the print job resolution under the Resolution drop-down menu
- Emailing the print job to an email address entered in the email field

4. Set the necessary options for PDF printing.

**Previewing the PDF :**

1. Click the **Preview** button; a preview copy of the PDF displays.
2. Review the form for any issues or needed corrections.

**Advanced menu option:**

1. Click the **Advanced** button.

The window expands to display the advanced print to PDF options.

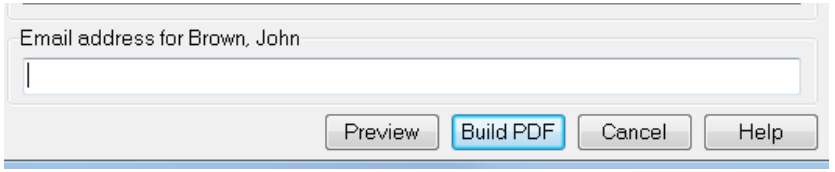
# Printing to PDF in ProFile, Continued

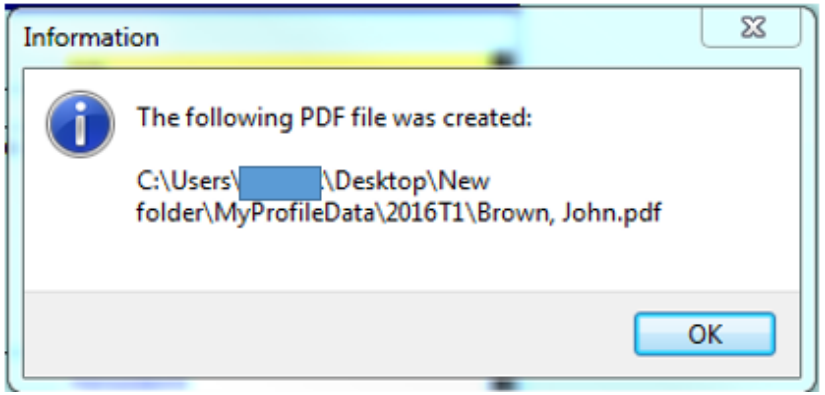
**Building the PDF:**

1. If there is an email listed in the **Email Address** field, delete the address.

The **Build PDF** button activates.

2. Click the **Build the PDF** button; the PDF creates and the path/file name displays.
3. Click the **OK** button; the build of the PDF completes.




**Related Articles:**

Review the support article to learn more about the Archive PDF functionality.

# Setting up Duplex Printing in ProFile

Duplex printing allows preparers to print returns on both sides of a single sheet of paper.

**Setting Duplex Printing Options:**

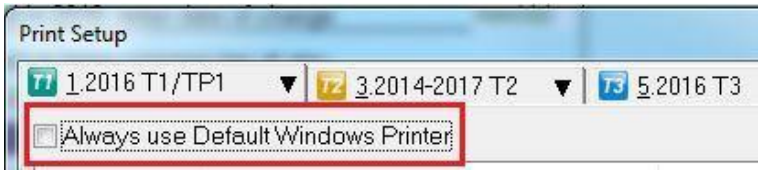
1. Open ProFile.
2. Select the **Print Setup** option from the **File** drop-down menu on the top toolbar; the **Print Setup** window displays.
3. Select the desired tax year and module from the tab menu at the top of the window (for example, **1. 2019 T1/TP1**).

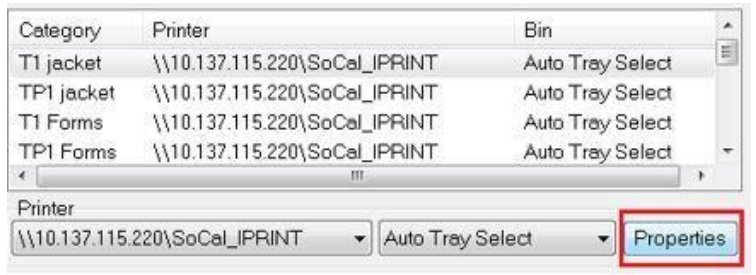
A list displays below the tabs, detailing available forms, letters, and more.

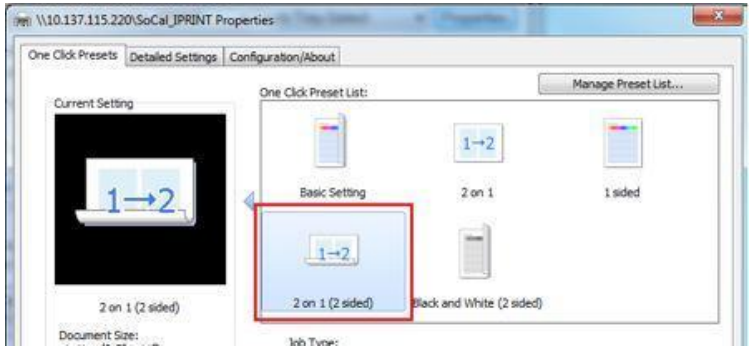
4. Uncheck the **Always use Default Windows Printer** above the **Category** heading.
5. Click on the first item listed under the **Category** heading (for example, **T1 jacket**).
6. Click the **Properties** button under the **Printer** heading.

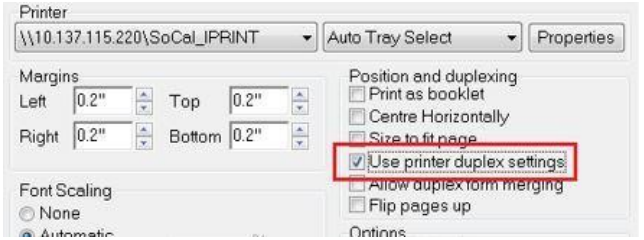
The **Print properties** window displays.

7. Select the duplex printing option from the options presented; note that this option may vary in name based on the individual printer manufacturer. In the example below, the duplex printing option is titled as "2 on 1 (2 sided)".
8. Click the **OK** button. In the **Print Setup** window, check the **Use printer duplex** settings box; this activates the duplex settings. Repeat the duplex printing configuration for each applicable option under the **Category** list (for example, **T1 forms**, **Letters**, etc.)



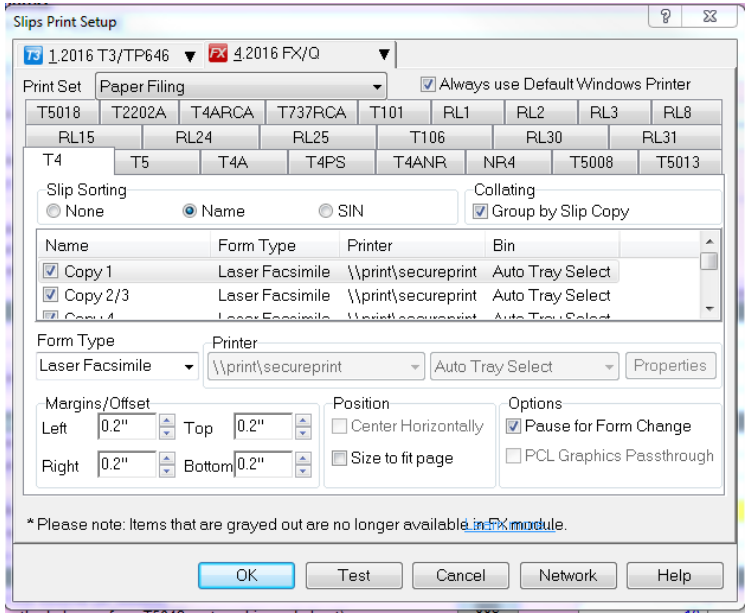



# Printing Slips in ProFile

When sending a slip to print from ProFile, the printout may be cut off, print a blank page, or not print at all. This is due to the slips official size conflicting with the printer settings.

**Changing default slip print settings:**

1. Select the **Print Slips Setup…** option from the **File** drop-down menu in the top toolbar. The **Slips Print Setup** window displays.
2. Select the tax year from the module drop-down menu in the top bar.
3. Select the slip type from the tab menu (for example, **T4PS**). Update and apply the necessary print slip settings.
4. Click the **Test** button to test print the settings.
5. Click the **OK** button; the settings save.




**Printing the slip:**

There are four printing options available under the File drop-down menu in the top toolbar:

- Print…
- Print / Email PDF…
- Print Slips…
- Print Slips / PDF

Each option opens a print settings window. Update and apply the necessary print slip settings.

Click the **Print** or **Build PDF** button; the slip prints or builds a PDF file.

**Reviewing the printed slip (if PDF printed):**

1. Open the generated PDF in the PDF-viewing software (for example, Adobe Acrobat); ensure that the PDF is set to fit on the page.
2. Select the desired paper size under the **Page Setup** option.
3. Match the desired paper size under the **Printer Properties** option.

# Managing Software Integration in ProFile

# QuickBooks Integration

It is easy and convenient to integrate QuickBooks with ProFile. Select the applicable activity below.

**Integrate ProFile and QuickBooks**

The integration process allows ProFile to display as an integrated application in QuickBooks.

Review the support article for more information.

**Importing data from QuickBooks to ProFile (T2)**

The import data process imports amounts from QuickBooks into ProFile.

Review the support article for more information.

**Using Adobe Sign and DocuSign**

Electronic signatures (or "eSignatures") are a new way to ask clients for signatures and other inputs on forms and documents in ProFile. ProFile users can track which requests have been completed and which are still outstanding in one convenient dashboard after requests have been sent to your customers.

Intuit supports two products that allows you to request signatures and other inputs directly from ProFile without having to track individual emails or files: Adobe Sign and DocuSign. Both are third-party partners of Intuit. Separate fees may apply, and a paid ProFile license is required for both Adobe Sign and DocuSign.

Learn more about setting up and using Adobe Sign and DocuSign.

# QBOA Software Integration in ProFile

QBOA integration is undertaken via the Workpapers.

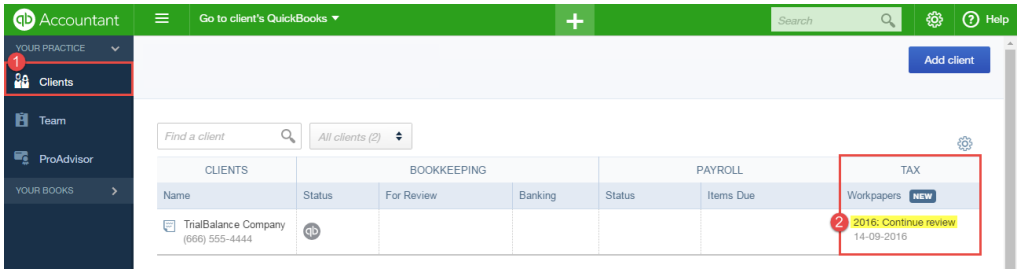
Workpapers is a collection of tools in QBOA that allows accountants/bookkeepers to quickly and efficiently complete year-end work for their client.

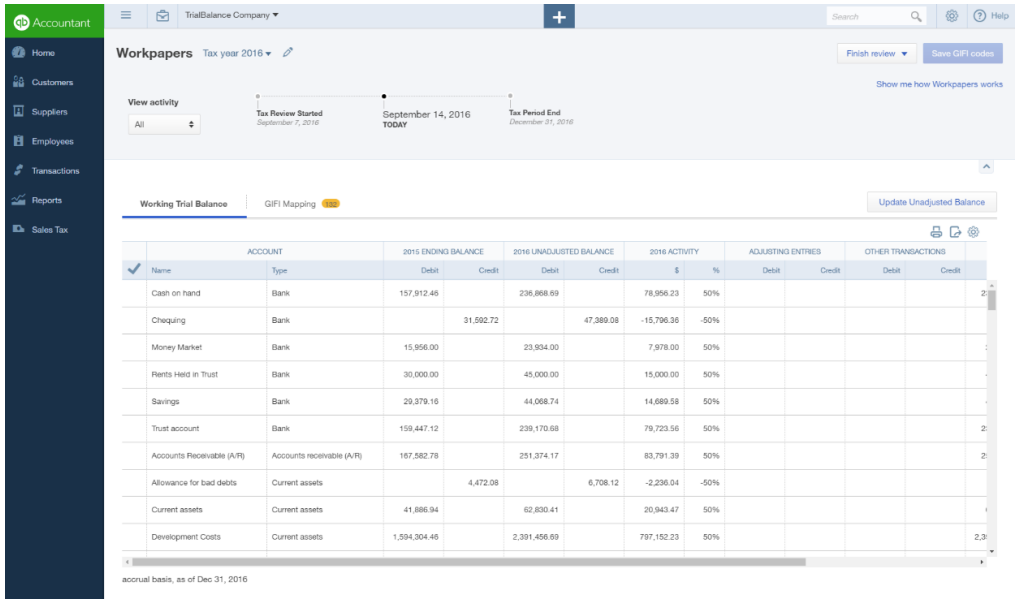
**Accessing Workpapers:**

Log in to the QBOA Firm containing the data to be exported:

https://ca.qbo.intuit.com/app/trialbalance

Click the hyperlink text under the Workpapers column.




**Preparing data to be exported in QBOA** :

1. Open QuickBooks.
2. Navigate to the Workpapers section for the client's books.

**Note:** Only tax year 2015 and forward are supported.

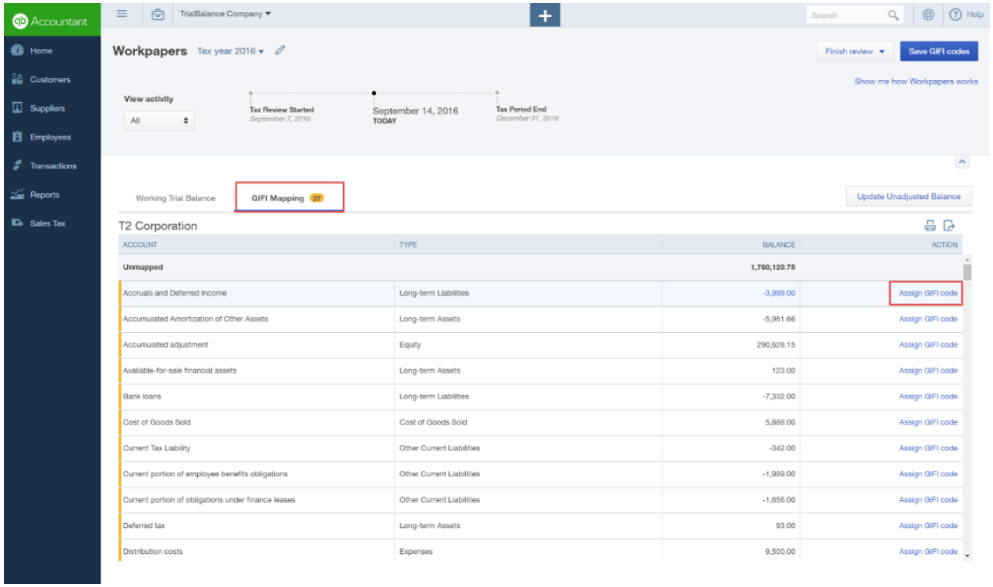
3. Review the **Working Trial Balance** and the **GIFI Mapping** to ensure all necessary work is complete.
4. Map any unassigned codes under the GIFI mapping section.
5. Navigate through the GIFI codes list and click on **Assign GIFI Codes** to assign; a row displays under the line to be mapped.
6. Select the GIFI code from the list.

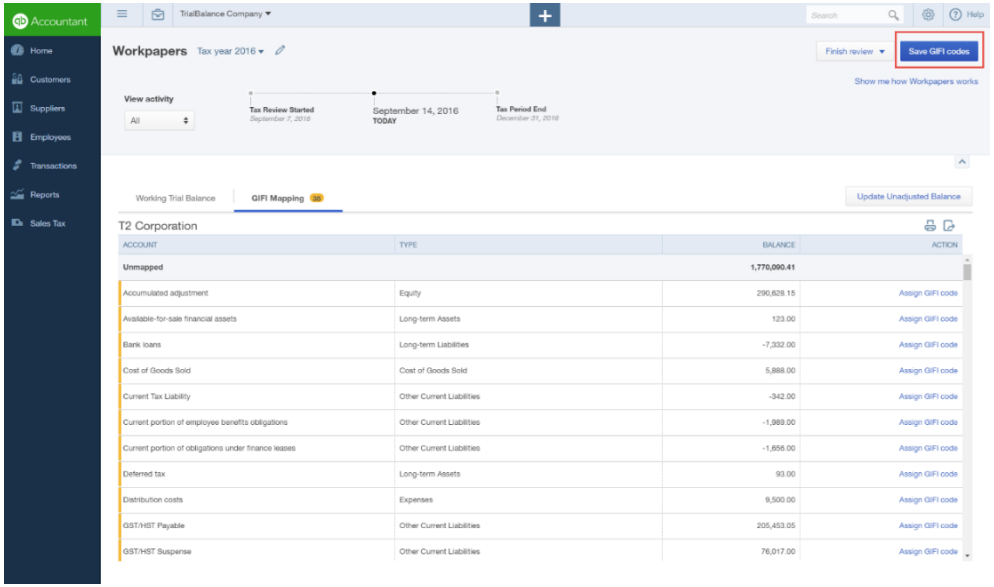
# QBOA Software Integration in ProFile, Continued

7. Once complete, click on **Save GIFI codes** in the top right corner; the information saves in the GIFI File format.
8. Open ProFile.
9. Create a T2 return, or open the existing T2 return associated with the QBOA firm.

**Importing the GIFI from ProFile** :

1. Select the **QBOA Import** option under the **File** drop-down menu in the top toolbar.
2. Click **OK**; the process completes.



# Managing One Intuit Accounts in ProFile

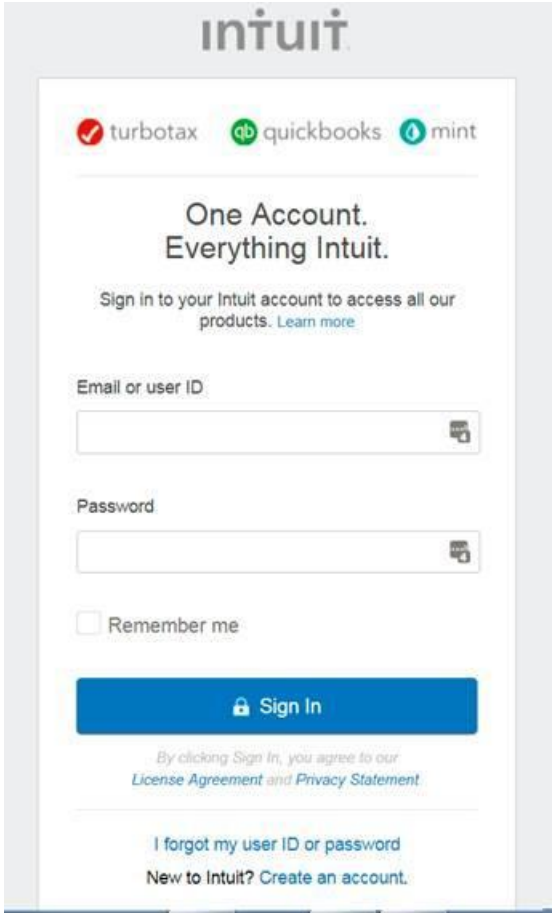
# Inuit “One Account” Login

The Intuit “One Account” tool allows access to several Intuit products and services with a single log in and password.

**One Inuit products and services**

The One Account tool provides access to the following:

- ProFile Link
- ProFile support community
- QBOA
- QBO
- TurboTax Online


intuit
turbotax
quickbooks
mint
One Account.
Everything Intuit.
Sign in to your Intuit account to access all our products. Learn more
Email or user ID
Password
Remember me
Sign In
By clicking Sign In, you agree to our License Agreement and Privacy Statement
I forgot my user ID or password
New to Intuit? Create an account.

**One Account access:**

Customers can create a One Account when accessing a supported service for the first time.

The **One Account** login window displays when accessing a supported service.

Select the **New to Intuit? Create an account** link at the bottom of the login window to create a new account.

# Using Backup to Cloud Feature in ProFile

# Using Backup to Cloud Feature in ProFile

Backup to Cloud is a new ProFile feature replacing the existing ProFile Review function.

ProFile users can safely and securely backup an unlimited number of files and returns on the virtual Cloud and retrieve the stored files at any time.

**What is the Cloud?**

The Cloud is ProFile's online repository that provides unlimited file storage and is available for backup and retrieval 24-hours per day.

**What type of files can I back up?**

Users can backup files for any module (T1, T2, T3, or FX) to the Cloud.

Note that only T1 and T2 module files can undergo backup to Cloud via Hub. Other modules, such as T3 and FX, can only undergo backup via the **Save As…** option in ProFile.

**What years are supported?**

Backup to the Cloud only supports the current year module, not previous years.

**Is there any limit to the number of files I can back up at one time?**

Users can back up 80 files at one time to the Cloud.

**Do I need to make a new Intuit account to use the backup to Cloud feature?**

No, users can use the same Intuit account used for ProFile Review.

**I backed up a file to the Cloud…is the original file on my hard drive deleted?**

No, the original file is still stored on your hard drive where it was.

**I deleted a file in the Cloud…is it gone forever?**

The file only deletes from the Cloud; it does not delete from the local storage directory.

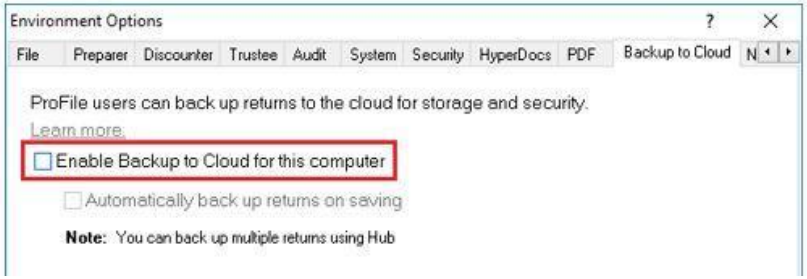
# Using Backup to Cloud Feature in ProFile, Continued

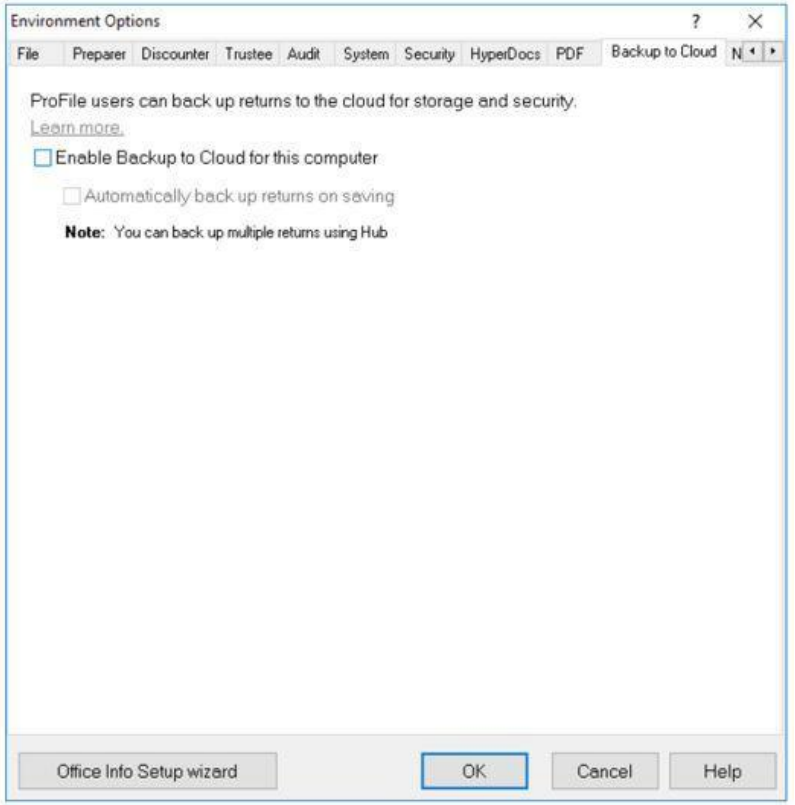
**Setting options for backup to Cloud?:**

The **Backup to Cloud wizard** displays upon starting ProFile.

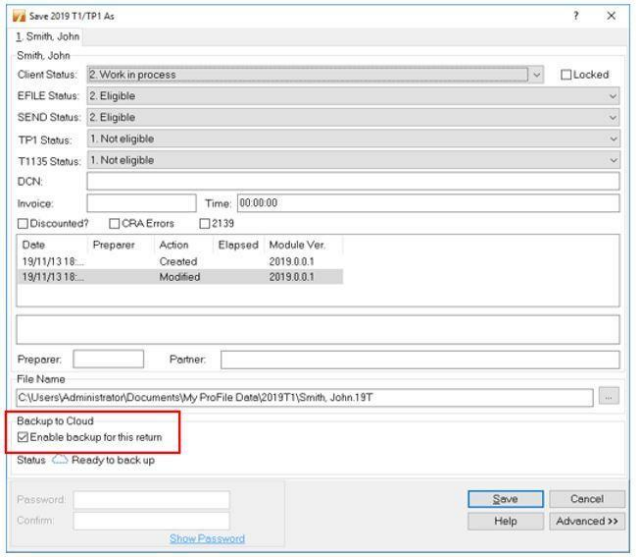
1. Select the **Environment Options** link to set options for backup; the **Environment Options window displays**.
2. Navigate to the **Backup to Cloud** tab.
3. Select the **Enable backup to Cloud for this computer** option.
4. Select the **Automatically back up returns on saving** option to enable auto-backup; this is not a mandatory option but it ensures that any time the file is saved on the desktop that it is also backed up to the Cloud.

Backup to Cloud
Securely protect your returns online using ProFile's Backup to Cloud. Here's how you can get started:
Enable Backup to Cloud
You'll need to turn it on in your Environment Options.
Choose when to back up
You can back up to the cloud automatically when you save your return or have more control by backing up with ProFile Hub.
Download on demand
Rest easy, you can retrieve your returns if they are lost or damaged.
Don't show again
Enable now
Remind me later



# Using Backup to Cloud Feature in ProFile, Continued




**Backing up a file to the Cloud:**

1. Open the file to upload in ProFile.
2. Select the **Save As…** option from the **File** drop-down menu in the top toolbar.

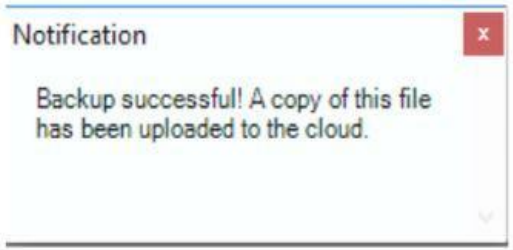
The **Save As** window displays.

3. If you selected the automatic backup option during setup, you now see a backup option when saving the file.

Note that the **Enable backup for this file** option is already selected.

4. Select the **Ready to backup** option.
5. Click the **Save** button.

A confirmation message indicates the backup has been successful.




If you did not select the automatic backup option during setup, you will see an option when saving the file in the future to back up to the Cloud or save only to the desktop.

6. Users can either select the **Enable backup for this file** option or leave it unselected.
7. Click the **Save** button; the file is saved either to the desktop only or to both the desktop and the Cloud.

A confirmation message indicates the backup has been successful.

Review our full support article for more information on backing up multiple files, reviewing files, and downloading or deleting files from the Cloud.

# Managing OnePay in ProFile

# Overview of ProFile OnePay

OnePay is a one-time license that allows a ProFile customer to file a single T1, T2, or T3 return. It is an alternative to purchasing a full ProFile license, which allows for unlimited returns.

OnePay is best suited for:

- An existing ProFile customer whose license has expired, but still needs to file a return or returns
- A new ProFile customer with a limited number of returns to be filed
- A resident of Quebec at the end of the fiscal year, and only the Federal module has been purchased and not the Quebec TP1 or the Quebec T646*
- A ProFile customer with a business registered in Quebec*

*In the event of the OnePay purchase for Quebec, the preparer is required to NetFile the TP1 separately from the Federal. They also require a NetFile QC Number and Access Code. For more information, visit Revenu Québec.

**Note:** If the taxpayer resides in any other Province and has an RL-1, the TP1 return is not necessary. The RL-1 information may be entered in the T4 form.

# Purchasing ProFile OnePay

OnePay is purchased only from within ProFile. An internet connection is required to complete the purchase via our secure web page.

**Note:** If purchasing a OnePay for a recurring client, carry forward the return(s) before purchase.

1. Open the necessary return in the appropriate module (for example, **T1**).
2. Select the **Star** icon from the top toolbar menu in ProFile, or select the **Purchase OnePay...** option from the **File** menu.

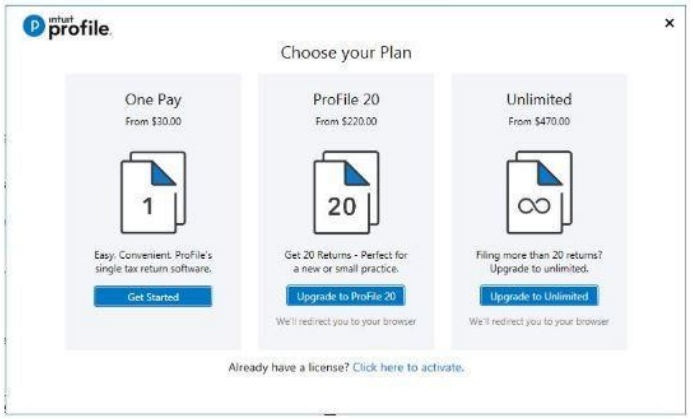
The product selection wizard displays.

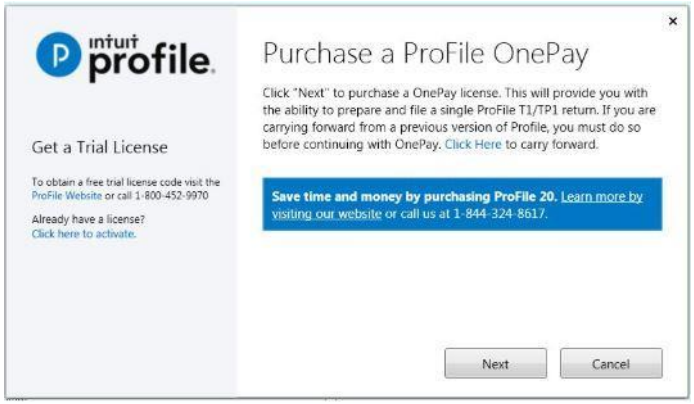
3. Click the **Get Started** button under the **OnePay** option.
4. Review the **Purchase a ProFile OnePay** window and click **Next** to proceed.
5. Enter the **Social Insurance Number (SIN)** and **first/last name** of the taxpayer whose return is to be filed.
6. Click the **Next** button.

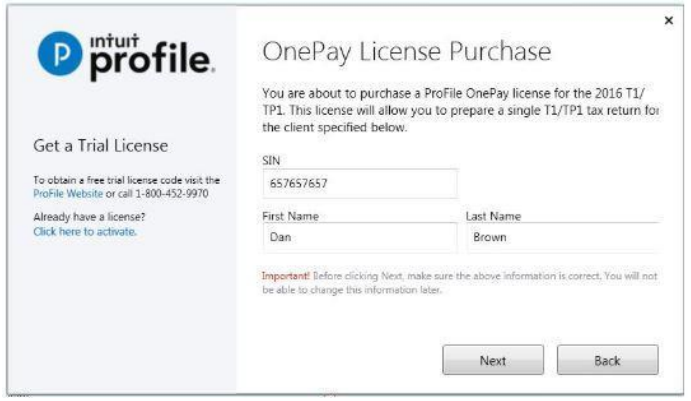
The payment screen loads.

The **shopping cart** window displays the details of the OnePay order.

7. Confirm the details of the OnePay order and click the **Checkout** button; the **Checkout** window displays.





intuit profile
Purchase a ProFile OnePay
Get a Trial License
To obtain a free trial license code visit the ProFile Website or call 1-800-452-9970
Already have a license?
Click here to activate.
Click "Next" to purchase a OnePay license. This will provide you with the ability to prepare and file a single ProFile T1/TP1 return. If you are carrying forward from a previous version of Profile, you must do so before continuing with OnePay. Click Here to carry forward.
Save time and money by purchasing ProFile 20. Learn more by visiting our website or call us at 1-844-324-8617.
Next
Cancel


intuit profile
OnePay License Purchase
Get a Trial License
To obtain a free trial license code visit the ProFile Website or call 1-800-452-9970
Already have a license?
Click here to activate.
You are about to purchase a ProFile OnePay license for the 2016 T1/ TP1. This license will allow you to prepare a single T1/TP1 tax return for the client specified below.
SIN
657657657
First Name
Dan
Last Name
Brown
Important! Before clicking Next, make sure the above information is correct. You will not be able to change this information later.
Next
Back

# Purchasing ProFile OnePay, Continued

8. Enter the necessary company and billing information.
9. Click the **Continue** button; the **Payment Information** window displays.
10. Enter the necessary payment information and click the **Continue** button.

The **Review Your Order** window displays.

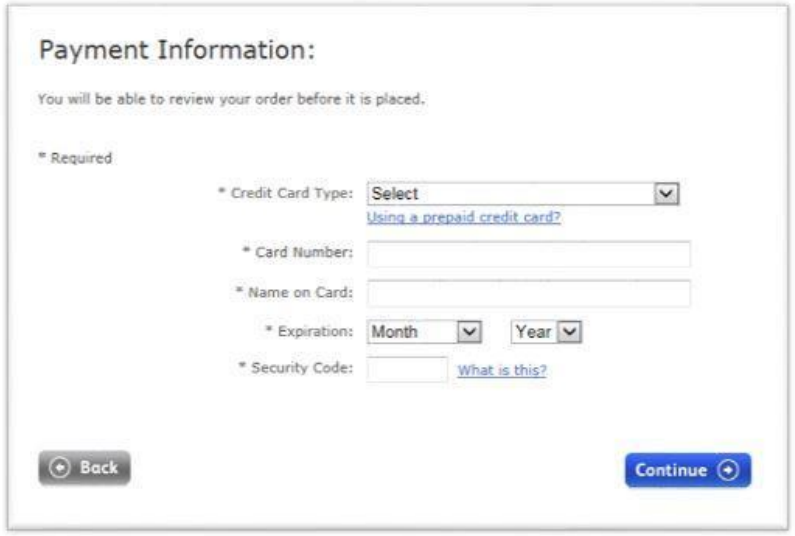
11. Review the payment and purchase information. If correct, click the **Place Order** button.

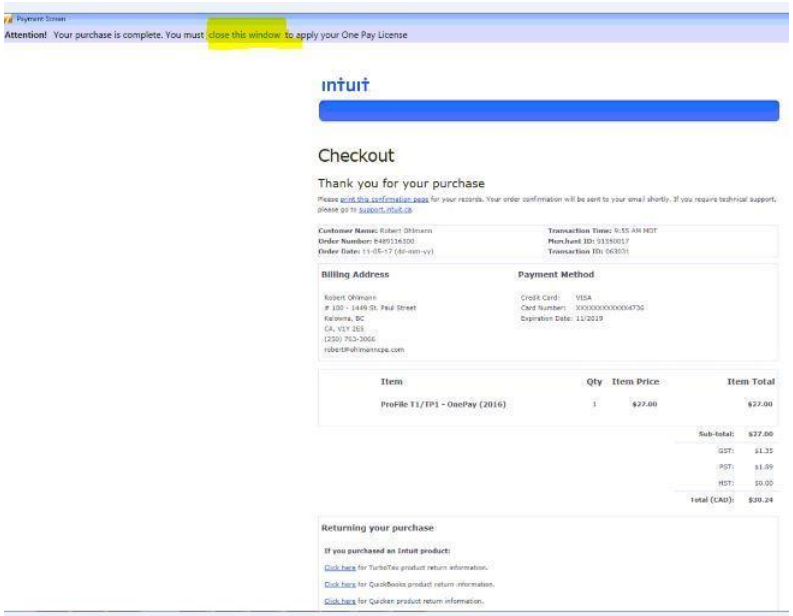
The confirmation window displays the OnePay order and cost.

12. Click the **close this window** link in the top bar; the link is highlighted in the screenshot.

The OnePay payment wizard closes.

13. The preparer returns to ProFile and to the return being filed.





Attention! Your purchase is complete. You must close this window to apply your One Pay License
intuit
Checkout
Thank you for your purchase

# Troubleshooting ProFile OnePay

**I am being prompted to purchase OnePay.**

If a ProFile customer attempts to populate a form for any module (for example, T1, T2, or T3) without an existing valid ProFile license, the OnePay purchase wizard displays.

**Can I use Auto-fill my Return (AFR) with OnePay?**

Yes. Prior to using AFR with OnePay the preparer requires:

- An EFILE account
- A representative ID
- EFILE a T1 Authorize a representative request

To learn more about authorizing or cancelling a representative, please review the CRA article.

**I downloaded a trial version of ProFile, but when I try to evaluate the software, the OnePay Wizard appears, asking me to purchase a return.**

When installing a ProFile Trial version, make sure you insert the new Product Code and License Key in the License window.

**I am seeing a TRIAL watermark written through all of the forms when I print the return using a OnePay license.**

This happens because the Trial license and the OnePay are both activated in ProFile at the same time and the Trial license is overriding the OnePay.

**In ProFile:**

1. Navigate to the **Help -> License -> Details** option.
2. Click on the **Trial License** option.
3. Click on the **Delete Selected License** option.
4. Close the **Licensing** windows
5. Open the file to print by navigating to the **File > Open** option.
6. Print normally.

If you have removed a Trial License and still get a trial watermark, call support for assistance.

# Troubleshooting ProFile OnePay, Continued

**I received an error message at the end of a OnePay purchase transaction.**

When purchasing OnePay through ProFile's OnePay Purchase wizard, the following error may appear:

"Your online purchase transaction was not completed. Please go back and review your selections".

This is not a ProFile error, but could be resulting from one of the following situations:

- High security settings on the computer (see solutions below)
- A network disruption (check your network is functioning)
- The transaction timed-out (retry the transaction to completion)

The following are solutions that may resolve the high security setting issue:

- Check ProFile version is the latest
- Check Windows Update for any recent OS updates
- Set firewall/antivirus exception for ProFile
- Set SSL/TSL security
- Allow pop-ups
- Clear your cache and browsing history
- Check for Proxy settings
- Check .NET version is the latest

**Can I purchase more than a single OnePay?**

When purchasing One-Pay, only one unit can be purchased at a time. If a quantity greater than one is entered in the Quantity field, you will be charged for that quantity but will only receive one license.

# Managing ProFile Security Settings

# Using Options Packages in ProFile

An options package is a file that preserves customized ProFile settings. These can include office details, printing options, database settings, and template and module settings.

Creating an options package means that your ProFile settings can be used by you or by others without having to recreate any preferences.

### How do I use the option package?

An options package can be used a few different ways:

- Saved on a shared network/server where everyone has access to it
- Saved on a terminal server where everyone has access to it
- Saved locally to a single computer that is not on a shared network/server

Depending on which use is selected, multiple users can work with ProFile in the same consistent manner, or an individual user can work with ProFile in a manner specific to themselves.

### Types of options packages

There are three types of options packages in Profile: **individual**, **shared**, or **custom**:

**Individual** options packages save on an individual computer and are loaded when ProFile launches.

**Shared** options packages save to a network/shared server where one or more individual computers have access to the package. This is the ideal option if you are using a network environment, Client Server, or Terminal Server environment.

**Custom** option packages allow the same ProFile options to be utilized even if an individual computer is disconnected from a network/server/terminal server. A Profile user creates custom options packages in different locations and instructs ProFile which to use.

# Creating an Options Package in ProFile

1. Start ProFile.
2. Select **Options Administration…** from the **Options** menu; the **Options Administration** window displays.
3. Set the necessary options for the package (for example, template use, pricing, database, etc.); these selections will become the settings in the new options package.
4. Select the options package type (**1**, **2**, or **3**).
5. Check the option **Include preparer and discounter name with Option packages**, if applicable.
6. Check the option **Prompt to save changes**, if applicable. This feature applies only to package types 2, 3, and 4 and selecting the option prompts the user to save any changes made to an options package when closing ProFile.

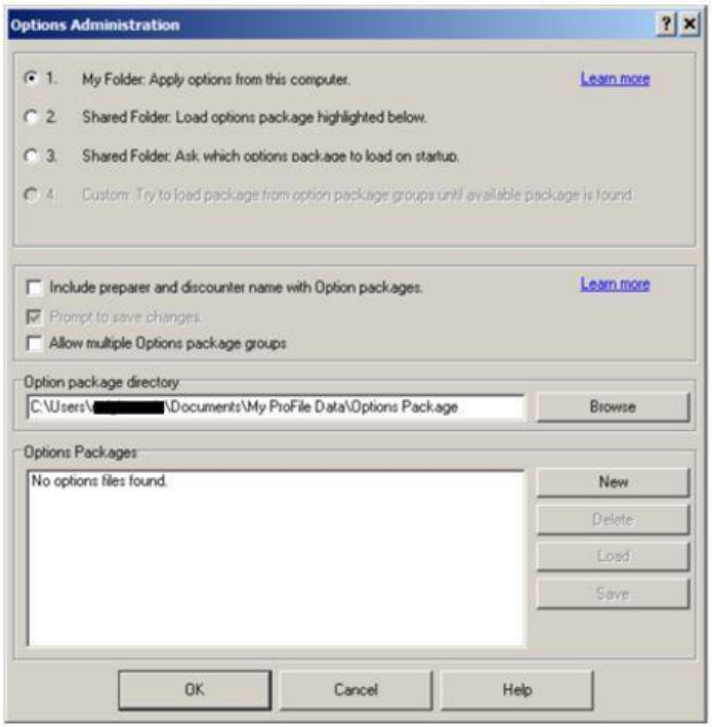
**Note:** Any changes made to an options package prior to ProFile being closed are **not** saved if the **Prompt to save changes** feature is not activated. Users must explicitly use the **Save** function to save any changes or they will be lost when closing Profile.

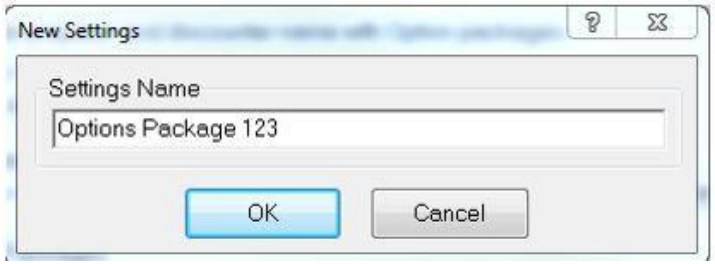
7. Click the **New** button.

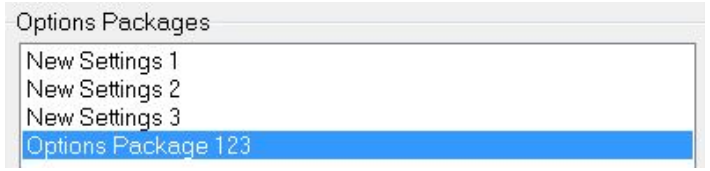
The **New Settings** window displays.

8. Enter the name of the new options package.
9. Click the **OK** button.

The new options package file saves to the designated location and displays in the **Options Packages** list.



## Managing Options Packages in ProFile

Options package management includes several tasks that can be undertaken, including:

- Creating a new options package
- Loading an options packages
- Updating an existing options package
- Deleting an options package
- Transferring an existing options package

Review our support article to learn more about how to manage option packages.

# Using Multiple, or Custom, Options Packages in ProFile

A computer that is utilizing an options package on a network/server/terminal server will lose access to it if the computer disconnects from the network/server/terminal server.

However, ProFile can be set to access an alternate local options package (or packages) on the individual computer's hard drive as a substitute to the network/server/terminal server options package. ProFile will first search for the designated options package on the network/server/terminal server; if that options package is not available ProFile will search for the next options package on the list.

**Note:** ProFile does not synchronize changes between options packages. Any changes to a local options package while disconnected from the network/server/terminal server are not saved in the network/server/terminal server options package.

### Managing files in multiple options packages

When the laptop connects to a network/server/terminal server, users should use the options package stored on the network/server/terminal server.

When the laptop disconnects from the network/server/terminal server users can specify an options package stored locally on the laptop itself.

However, be aware that by having two different sets of options you are using two different databases. Files created or changed when you disconnect from the network/server/terminal server will not be listed in the database stored on the network/server/terminal server.

### Creating and assigning multiple options packages

ProFile users who will disconnect at some future time from a network/server/terminal server and continue working will need to create at least two options packages: one for connected network/server/terminal server use and one for when disconnected from the network/server/terminal server. This allows the disconnected work to use the same options package settings as that on the network/server/terminal server.

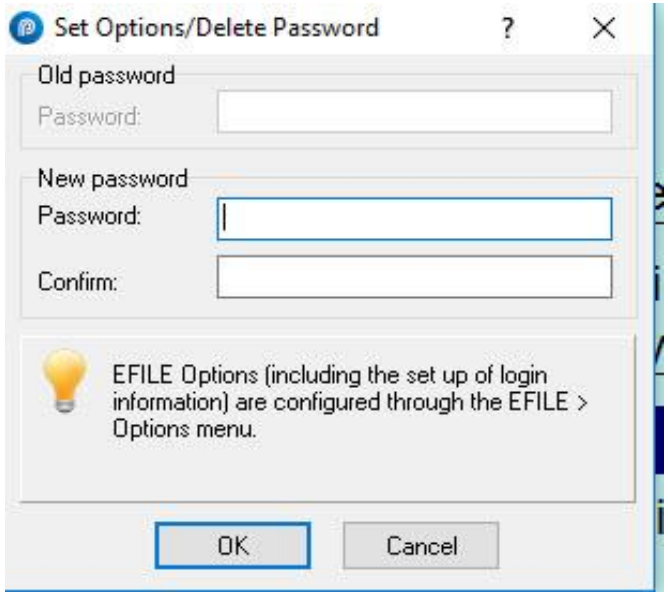
### Related articles

Review our support article to understand more about using multiple options packages.

# Password Protecting Options and Options Packages in ProFile

Any options package can be password-protected. This prevents unauthorized users or other preparers from altering the options package.

This feature protects both the **computer options** and the **options package**.




**Password protecting options packages:**

1. Select the **Options password…** item from the **Options** drop-down menu in the top toolbar.

The **Set Options/Delete Password** window displays.

2. Enter a password in the **Password:** field of the **New password** section.
3. Enter the same password again in the **Confirm:** field.
4. Click the **OK** button.

The password saves and the options package file is protected from alterations and deletion. A prompt requesting the password displays any time changes are made to the settings.

**Note:** This password applies to Options packages only; it is **not** an EFILE password.

# Data/File Locking in ProFile

Data locking automatically locks a return to prevent any changes from occurring after the return's status is set.

**Setting the data locking options:**

1. Open ProFile.
2. Select the **Module…** option from the **Options** drop-down menu in the top toolbar menu.

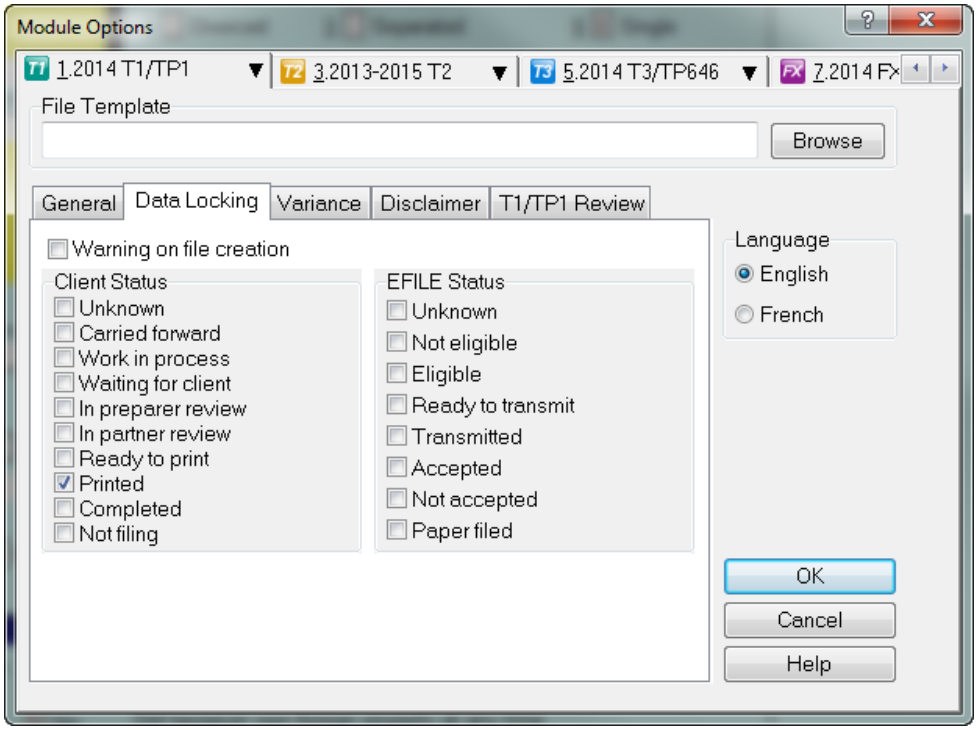
The **Module Options** window displays.

3. Select the appropriate module and year from the tab menu in the top of the window (for example, **2019 T1/TP1**).
4. Select the **Data Locking** tab.
5. Select the appropriate option under the **Client Status** list.
6. Select the appropriate option under the **EFILE Status** list.

**Note:** One or more options may be selected from the lists.

7. Click the **OK** button.

The file locks when the selected criteria occur.



# Data/File Locking in ProFile, Continued

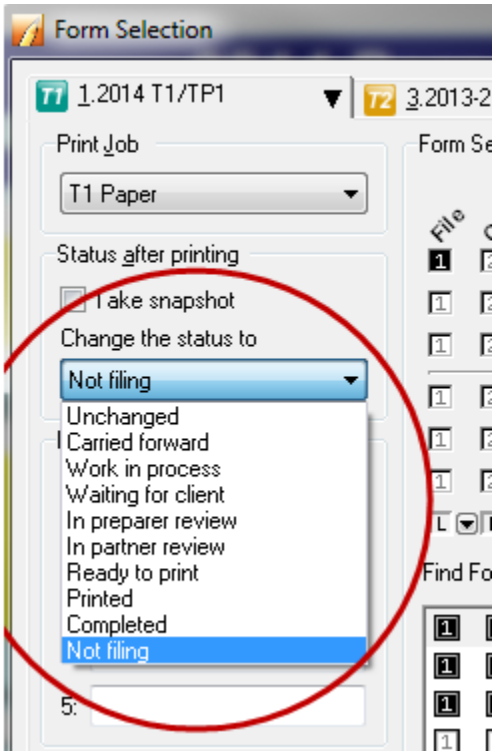
**Setting the Print locking options:**

1. Select the **Form Selection…** option from the **Options** drop-down menu in the top toolbar menu.

The **Form Selection** window displays.

2. Select the appropriate module and year from the tab menu in the top of the window (for example, **2019 T1/TP1**).
3. Click the drop-down menu arrow in the **Status after printing** section; the menu expands.
4. Select the appropriate option from the menu.
5. Set the appropriate options for each module.
6. Click the **OK** button.

After the return is printed, the return locks to the selected status.



# PDF Locking in ProFile

Data locking automatically locks a return to prevent any changes from occurring after the return's status is set.

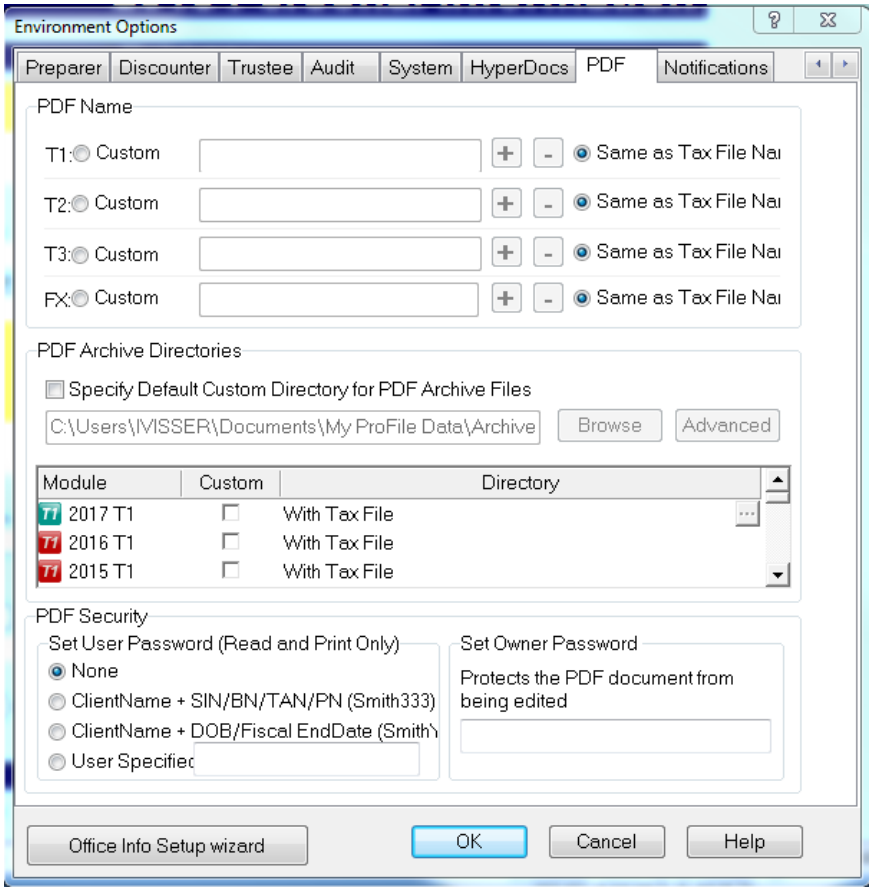
**Setting the PDF locking options:**

1. Open ProFile.
2. Select the **Environment…** option from the **Options** drop-down menu in the top toolbar menu.

The **Environment Options** window displays.

3. Select the **PDF** tab.
4. Select the appropriate option under the **PDF Security** option list:

- None
- Client Name + SIN/BIN/TAN/PN
- Client Name + DOB/Fiscal EndDate
- User Specified




**Setting Owner Password:**

The Set Owner Password option provides an additional level of security to prevent a locked PDF from being edited.

1. Enter a password in the **Set Owner Password** field; users will require this password to open a file, in addition to any password set in the **PDF Security** option list.
2. Click the **OK** button; the PDF locking selection applies.

# Keyboard Shortcuts in ProFile

If a preparer processes a large volume of client files, there is an advantage to learn the keyboard shortcuts for common functions in ProFile.

| Action | Shortcut Command |
|---|---|
| Attach tape | <Ctrl+F8> |
| Back to previous form | <Alt+F7> |
| Carry forward a file | <Ctrl+R> |
| Clear highlighter | <Ctrl+H> |
| Clear review mark on field | <Ctrl+Alt+0> |
| Close current window | <Ctrl+F4> |
| Copy field | <Ctrl+C> |
| Correction required mark | <Ctrl+Alt+3> |
| Create a new file | <Ctrl+N> |
| Cut field | <Ctrl+x> |
| Display jump list | <Shift+F6> |
| Display previous audit message | <Shift+F9> |
| Ditto key | (back apostrophe) |
| EFILE this return | <Ctrl+F11> |
| Instant SEND | <Shift+F11> |
| End review | <Ctrl+E> |
| Exit ProFile | <Alt+F4> |
| Explorer Keyword view | <Shift+F7> |
| Explorer Line view | <Shift+F4> |
| Federal/Quebec toggle | <Shift+F5> |
| File properties | <Ctrl+I> |
| Form help | <Shift+F1> |
| Next checklist form | <Ctrl+Alt+PgDn> |
| Next Edit window form | <Ctrl+Tab> |
| Next file | <Ctrl+F6> |
| Next page on form | <Ctrl+PgDn> |
| Next section on form | <Alt+PgDn> |
| Non-zero T1 summary | <Ctrl+F10> |
| Open an existing file | <Ctrl+O> |

# Keyboard Shortcuts in ProFile, Continued

| Action | Shortcut Command |
|---|---|
| Open form in new window | <Ctrl+Alt+F6> |
| Open the Tape dialog box. | <=> |
| Override format | <Ctrl+F2> |
| Partner sign-off | <Ctrl+Alt+2> |
| Paste field | <Ctrl+V> |
| Pause / start timer | <Ctrl+T> |
| Preparer sign-off | <Ctrl+Alt+1> |
| Previous checklist form | <Ctrl+Alt+PgUp> |
| Previous Edit window form | <Ctrl+Shift+Tab>* |
| Previous page on form | <Ctrl+PgUp> |
| Previous section on form | <Alt+PgUp> |
| Print file(s) | <Ctrl+P> |
| Question review mark | <Ctrl+Alt+4> |
| Quick-print audit messages | <Alt+F9> |
| Quick-print T1 summary | <Ctrl+Alt+F10> |
| Quick-print T183 form | <Alt+F11> |
| Quick-print tax summary | <Alt+F10> |
| Save the file | <Ctrl+S> |
| Show/hide auditor | <Ctrl+F9> |
| Snapshot/Variance | <Alt+F8> |
| Switch to family member | <Alt+F5> |
| T1, T2, T3 jacket | <Ctrl+J> |
| Toggle T1/TP1 | <Shift+F5> |
| Toggle T2/AT1 RSI | <Ctrl+F5> |
| Top of next slip | <Ctrl+Enter> |
| Top of previous slip | <Ctrl+Shift+Enter> |
| ProFile Help | F1 |
| Override | F2 |
| Client Explorer | F3 |

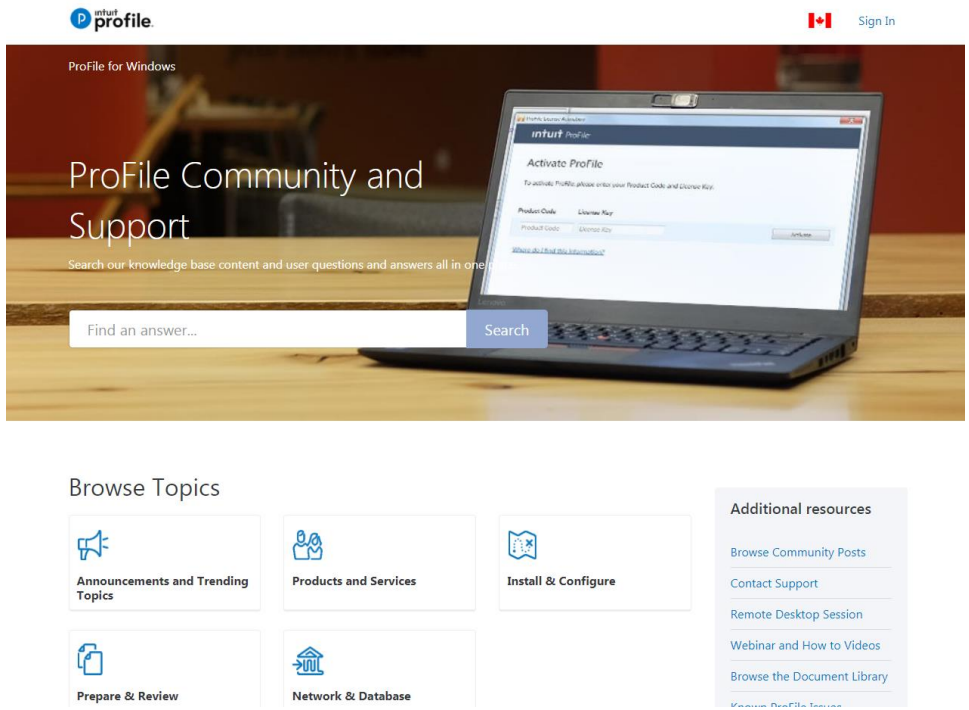
# Learning More About ProFile

# ProFile Community and Support Site

The ProFile Community and Support Site is available to serve our valuable customers more effectively. You can now search both our support articles and forum questions at the same time, in order to return the best possible answer to your product question.

Available 24 hours a day, our Community and Support Site has more than 1,200 articles designed to improve your ProFile experience.

https://profile-en.community.intuit.ca/profile-ca-en



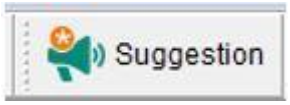
# Sending Feedback About ProFile

ProFile users can conveniently provide feedback on ProFile's functionality or suggest an enhancement to the product.

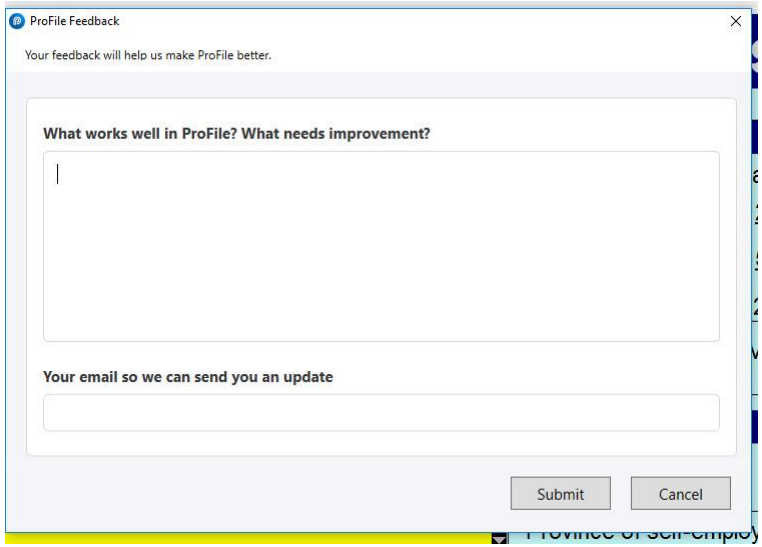
All feedback is reviewed by the product owner, developer, or analyst.

**Opening the feedback window in ProFile:**

1. Select the **Send Feedback** option under the **Help** drop-down menu in the top toolbar, or click the **Suggestion** button in the top toolbar.




The **ProFile Feedback** window displays.


ProFile Feedback
Your feedback will help us make ProFile better.
What works well in ProFile? What needs improvement?
Your email so we can send you an update
Submit
Cancel

2. Describe your idea in the feedback field; you can be as specific as you like.
3. Enter your email so ProFile can contact you in case more details are required.
4. Click the **Submit** button when finished.

The **Additional details** window displays.

# Additional ProFile Resources

### Training and Tutorials Site

Whether you are a new ProFile user or an experienced professional, you can enhance your skills with our training resources, video tutorials, and Tips & Tricks site. Updated regularly, this site includes both core and advanced information to help throughout the return preparation process.

http://profile.intuit.ca/professional-tax-software/training.jsp

### Webinars Calendar

Keep learning with our informative webinars, held every Tuesday and Thursday throughout the year. Live webinars take you through the finer points of ProFile, and if you have any questions, our experts are there online with you, ready to answer.

You can join an upcoming webinar through the calendar:

http://profile.intuit.ca/professional-tax-software/webinars-events.jsp

### In-Product Help

The in-product Help utility provides an easy way to learn about forms, slips, schedules, ProFile's functions, and many other topics. Simply press the <F1> key from anywhere in ProFile to launch the Help utility.

### Live Chat

Inside the ProFile software (and on many of our support pages) you will find the Live Chat option. This quick and convenient tool lets you immediately begin speaking to one of our support representatives online, without having to wait on the phone or interrupt your work. Available during our regular support hours.